User Manual

pDoc Signer

June 24, 2015

Copyright © Topaz Systems Inc. All rights reserved.

*For Topaz Systems, Inc. trademarks and patents, visit **www.topazsystems.com/legal**.*

Table of Contents

1.0 – Introduction 5

1.1 – pDoc Forms Designer 5

1.2 – pDoc Signer 6

2.0 – Installing/Uninstalling pDoc Signer 6

2.1 – Before You Begin 6

2.2 – Installing the Signature Capture Device 6

2.3 – Installing pDoc Signer 6

2.4 – Uninstalling pDoc Signer 7

2.5 – Silent Installation of pDoc Signer 7

3.0 – Features of pDoc Signer 7

3.1 – Basic Operations and PDF File Manipulation 7

3.1.1 – Opening PDF Documents 7
3.1.2 – Saving PDF Documents 8
3.1.3 – Page Navigation and Zooming 8
3.1.4 – Closing PDF Documents 9
3.1.5 – Exiting pDoc Signer 9
3.1.6 – About 9

3.2 – Filling in Form Fields 9

3.2.1 – Electronic Signature Box 10
3.2.2 – Text Box 10
3.2.3 – Radio Button 10
3.2.4 – Check Box 10
3.2.5 – List Box 11
3.2.6 – Combo Box 11
3.2.7 – View Properties of Form Fields 11
3.2.8 – Setting the Font Options 11

Table of Contents

3.3 – Electronic Signatures 12

3.3.1 – Insert and Sign 12
3.3.2 – Signature Capture Process 13
3.3.3 – Validation of Signatures 14
3.3.4 – View Signed and Unsigned Signature Fields 17
3.3.5 – Viewing Previous Versions of a Signed Document 18
3.3.6 – Specifying Signature Field Options 20
3.3.7 – Signature Capture Options 21
3.3.8 – Signature Information 23
3.3.9 – Automatic Configuration of Certificate 24
3.3.10 – Certificate Selection 24

3.4 – Sticky Note Comments 25

3.4.1 – Adding Sticky Note Comments 25
3.4.2 – Viewing Sticky Note Comments 27
3.4.3 – Deleting Sticky Note Comments 27

3.5 – Text Comments 28

3.5.1 – Adding Text Comments 28
3.5.2 – Updating Text Comments 30
3.5.3 – Deleting Text Comments 30

3.6 – Pencil Tool 30

3.6.1 – Draw Pencil Markup 31
3.6.2 – Delete Pencil Markup 32
3.6.3 – Settings For Using the Pencil Tool 32

3.7 - Attachments 33

3.7.1 – Adding Attachments 33
3.7.2 – Delete Attachments 34
3.7.3 – View Attachments 34

3.8 – Securing Documents 34

3.8.1 – Opening Secured Documents 37

3.9 – Printing and Print Preview 37

Table of Contents

3.10 – Merging and Splitting of PDF Documents 38

3.10.1 – Extract Pages *38*
3.10.2 – Delete Pages *39*
3.10.3 – Insert Pages *39*
3.10.4 – Replace Pages *40*

3.11 – Command Line Arguments 43

3.12 – Recent File List 43

4.0 – Appendix 43

4.1 – pDoc Signer Silent Installation Instructions 43

4.2 – Making pDoc Signer the Default Program for Opening PDF Documents 44

4.3 – Pen Display Installation and Calibration 46

1.0 – Introduction

pDoc Signer allows signing of PDF documents in a legally binding and secure manner. One can embed handwritten signatures into PDF documents using this application. The application allows one to visualize, fill and sign electronic documents, and create electronic signatures using your handwritten signature. pDoc Signer also allows creation and filling of form fields. In addition to digital signatures and form fields, pDoc Signer provides many other features to manipulate the PDF. The remainder of the document describes the feature set and usage of the pDoc Signer application. Handwritten signatures in pDoc Signer application are captured using Topaz Signature Capture devices. See **www.topazsystems.com.**

pDoc Signer captures the handwritten “biometric” signature. The captured signature is shown in the corresponding signature field in the document and can be viewed and verified in pDoc Signer, or by other PDF document rendering applications like Adobe Acrobat or Reader.

pDoc Signer product has two main applications: pDoc Forms Designer and pDoc Signer.

1.1 – pDoc Forms Designer

The pDoc Forms Designer application is intended for people who are designing forms using PDF documents. It is a graphical form design tool that simplifies the creation of form designs for distribution as PDFs. Form recipients can fill, sign, print and save the filled-in form onto the disk.

Using pDoc Forms Designer, form authors can drag-and-drop form fields such as Text Boxes, Check Boxes, Radio Buttons, List Boxes, Combo Boxes and Electronic Signature fields.

pDoc Forms Designer also allows the designer to move and resize fields as required. Optionally the forms designer can use features like adding attachments to attach any other relevant documents to the PDF being designed.

After the PDF form is designed, the form can be secured if required using the Secure Document feature of the pDoc Forms Designer.

1.2 – pDoc Signer

pDoc Signer is the application designed for the end-users who fill-in and sign the form. In addition to filling-in and signing, pDoc Signer also provides features like adding comments, pencil markups, and attachments. If required, you can also insert additional signatures using the Insert & Sign feature.

After the form is filled in and signed, the form can be secured if required using the Secure Document feature of the pDoc Signer.

The remainder of this document explains the features of the pDoc Signer application in detail.

2.0 – Installing/Uninstalling pDoc Signer

2.1 – Before You Begin

- pDoc Signer is supported for operating systems Windows Vista and higher, and Windows 8 Tablets and higher.
- Your system should have a minimum of 30 MB free space on the hard drive, in addition to the free space requirements for Windows.
- Before installing a new version of pDoc Signer, uninstall any older versions of pDoc Signer on your machine.

2.2 – Installing the Signature Capture Device

pDoc Signer uses the signature pad software drivers that provide communication between your PC and the signature pad, so the drivers must be installed on your PC before you can capture signatures with pDoc Signer. If you have not installed the signature capture device, refer to the manual provided by the signature capture device manufacturer for installation instructions. Test the operation of the signature pad to insure that your PC can communicate with it properly.

2.3 – Installing pDoc Signer

Installing pDoc Signer software is accomplished by running the pDoc Signer installation file provided. During the installation one will be provided with an option to agree or disagree to the license agreement, prompted to enter user information, and optionally set a different folder for installation. The sequence of screens displayed guide the user through the installation process.

During installation of pDoc Signer, an option screen with a check box for installing pDoc Forms Designer will be provided. If the user checks the pDoc Forms Designer option, the pDoc Forms Designer will be installed in the PC.

After installing pDoc Signer:

- One can access the pDoc Signer application using “Start → Programs →pDoc Signer →pDoc Signer”.
- One can access the pDoc Forms Designer application using “Start → Programs → pDoc Signer →pDoc Forms Designer”.

2.4 – Uninstalling pDoc Signer

To uninstall pDoc Signer:

- Go to Start→ Settings → Control Panel →Add/Remove programs.
- Select pDoc Signer and click on the “Remove” button. Follow the instructions to uninstall the software.

Signatures that have been placed into documents are not removed during un-installation.

Note: Deleting the pDoc Signer installation folder directly will not uninstall the software completely.

2.5 – Silent Installation of pDoc Signer

See the appendix for details on silent installation of pDoc Signer.

3.0 – Features of pDoc Signer

3.1 – Basic Operations and PDF File Manipulation

3.1.1 – Opening PDF Documents

PDF documents can be opened in pDoc Signer in two ways: either by using the “File →Open” menu option or by using the “Open File” icon in the toolbar.

When you click on one of the two options above, you will be prompted to select the PDF document to be opened. If another PDF document is already opened and there are changes to be saved, pDoc Signer displays a message saying that “Only one document may be open at a time. Do you want to save changes to the previously opened document?” Click on “Yes” or “No” to proceed further and select a new document to open.

Once the file is selected, the first page of the PDF file is displayed in pDoc Signer.

If the PDF document that is being opened is secured document, refer to section 3.8.1 for further explanation.

One can also select a PDF from the list of recently opened file list. Refer to section 3.12 for more information.

3.1.2 – Saving PDF Documents

The PDF document opened in pDoc Signer can be saved in two ways: either by using the “File →Save” menu option or by using the “Save File” icon in the toolbar. The “Save” option is enabled only when there are changes that are not yet saved.

You can use the “File →Save As” menu option to save the document to a new file.

Also, pDoc Signer prompts you to save the file (if there are any changes that are not yet saved) when you try to open another PDF document while this document is still open or when exiting the pDoc Signer application.

3.1.3 – Page Navigation and Zooming

One can use the page navigation buttons available on the pDoc Signer toolbar to navigate between pages. Alternatively, one can select the page number in the Page Number list to navigate directly to the selected page.

If you are using a Windows Tablet and a licensed version of pDoc Signer, you can use the tablet touch movements to navigate between pages. If you swipe to the left, you will be navigated to the next page. If you swipe to the right, you will be navigated to the previous page.

To move with in a page, you can use the scroll bar available on the right side of the pDoc Signer UI.

If you are using a Windows Tablet and a licensed version of pDoc Signer, you can use the tablet touch movements to move within a page. If you swipe up, the page will move up, and if you swipe down, the page will move down.

To zoom in or zoom out, use the zoom buttons available in the toolbar. Every click of the zoom button will increase or decrease the percentage by 25%. Alternatively, you can select the zoom percentage in the available list. The maximum allowed zoom percentage is 200% and the minimum is 25%.

If you are using a Windows Tablet and a licensed version of pDoc Signer, you can use the tablet touch movements to zoom in or zoom out. If you "pinch" your fingers towards each other while keeping contact with the screen, the page will be zoomed out by 25%. If you move your fingers away from each other, the page will be zoomed in by 25%.

3.1.4 – Closing PDF Documents

The PDF document that is currently opened in pDoc Signer can be closed using the “File →Close” menu option. If there are any changes that are not yet saved, pDoc Signer prompts you to do so before closing.

3.1.5 – Exiting pDoc Signer

To exit completely from pDoc Signer, chose “File →Exit” menu option or the Red “X” button on the top right corner of the pDoc Signer application. If there are any unsaved changes in the currently opened PDF document, pDoc Signer prompts you to do so before exiting.

3.1.6 – About

The “About” menu in pDoc Signer application contains three menu items: “About pDoc Signer”, “What’s New”, and “Introducing pDoc Signer”.

“About pDoc Signer” provides info about the installed version of pDoc Signer. Clicking on the “What’s New” menu item displays the “What’s New in pDoc Signer” PDF document in another instance of pDoc Signer. Clicking on the “Introducing pDoc Signer” menu item displays the Introducing pDoc Signer PDF document in another instance of pDoc Signer. This document provides an introductory tutorial on pDoc Signer.

3.2 – Filling in Form Fields

When a PDF containing form fields is opened in pDoc Signer, pDoc Signer displays the form fields that are available for filling at appropriate locations. The form fields that are supported are Electronic Signature Box, Text Box, Radio Button, Check Box, and List and Combo Boxes. Any other types of form fields present in the PDF are not displayed in pDoc Signer.

One can fill values in the displayed form fields and save the PDF to make the changes permanent.

3.2.1 – Electronic Signature Box

Place the mouse pointer on the electronic signature box. The mouse pointer will change from default pointer to a hand sign. Now clicking on the electronic signature box will initiate the act-of-signing. Once the act-of-signing is complete, the fields that are set to be made read-only when this field is signed become read-only.

If the Electronic Signature Box was created or the properties were edited in any another PDF manipulation tools, the only property that is honored by pDoc Signer is the “Mark as Read-only”. Any other properties that have been set are ignored in pDoc Signer.

3.2.2 – Text Box

If the Text Box was created or the properties were edited in any another PDF manipulation tool, the properties that are honored by pDoc Signer are “Tooltip” and “Multi-line”. Any other properties that have been set are ignored in pDoc Signer.

3.2.3 – Radio Button

If the Radio Button was created or the properties were edited in any another PDF manipulation tool, the properties that are honored by pDoc Signer are “Tooltip” and if buttons with same name and export value are selected in unison or not. Any other properties that have been set are ignored in pDoc Signer. Also, the presence of special characters like "# % ( ) / [ ] { <> ;" in the export value might lead to unexpected behavior in pDoc Signer.

3.2.4 – Check Box

If the Check Box was created or the properties were edited in any another PDF manipulation tool, the properties that are honored by pDoc Signer are “Tooltip” and the export value. Any other properties that have been set are ignored in pDoc Signer. Also, the presence of special characters like "# % ( ) / [ ] { <> ;" in the export value might lead to unexpected behavior in pDoc Signer.

3.2.5 – List Box

If the List Box was created or the properties were edited in any another PDF manipulation tool, the properties that are honored by pDoc Signer are “Tooltip” and if the list box allows multiple selection or not. Any other properties that have been set are ignored in pDoc Signer.

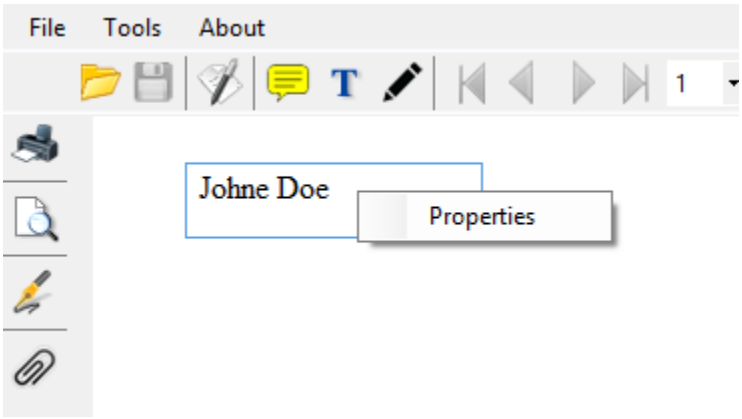
3.2.6 – Combo Box

If the Combo Box was created or the properties were edited in any another PDF manipulation tool, the properties that are honored by pDoc Signer are “Tooltip” and if one can enter custom text into the combo box or not. Any other properties that have been set are ignored in pDoc Signer.

3.2.7 – View Properties of Form Fields

You can view the properties of the existing form fields by right clicking on them and then by selecting the properties menu options.

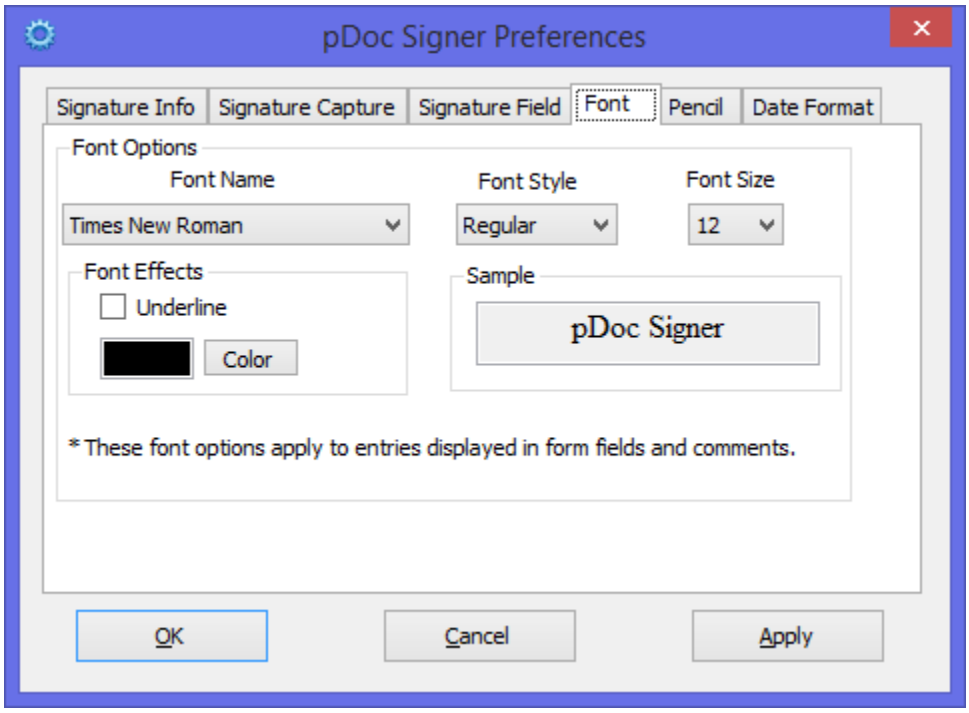
Clicking on “Properties” displays the properties window of the particular form field and populates the information of the form field in the displayed window. The properties displayed will depend on the type of the form field being selected. Grayed out boxes imply that the values cannot be changed.



3.2.8 – Setting the Font Options

To set the font options for the entries displayed in form fields and comments, go to “Tools→Preferences”. Click on the “Font” tab and select the Font options such as Font Name, Font Style, Font Size, Font Color, and Font Effects such as underline. The selected effects will be applied to the sample text. Once the desired options are selected, click on ‘Apply’. Note

that the default font settings are Times New Roman, Regular Face, Size 12, No Underline, and Black.

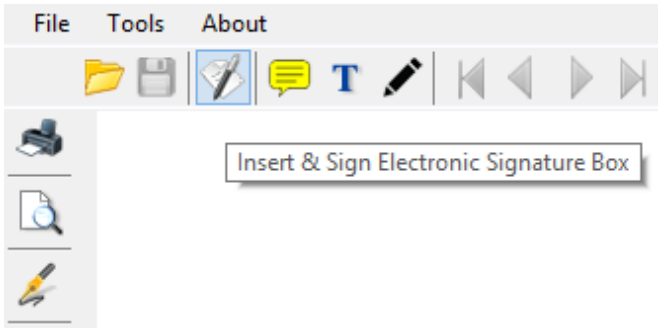


Note: The font settings apply to the presentation of text in form fields and comments on your display. When the PDF is rendered (for example when it is printed, opened in Print Preview, or opened in another PDF application), the PDF default font Helvetica is used, and the font size is determined by the size of the field and the length of the text.

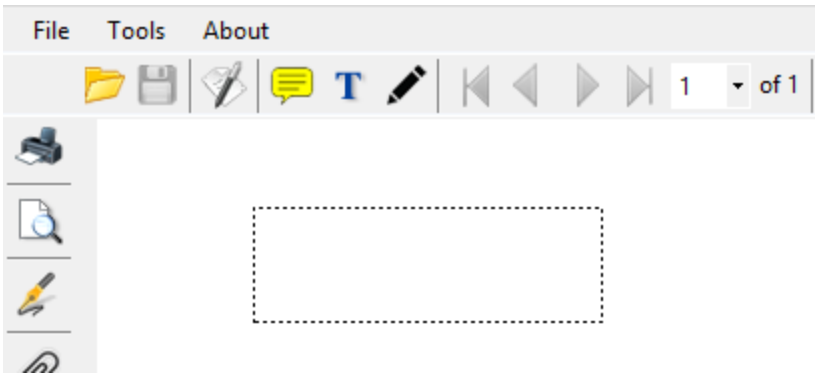
3.3 – Electronic Signatures

pDoc Signer allows one to insert an electronic signature field and sign it immediately using the "Insert & Sign" toolbar icon. This toolbar icon is displayed by default.

3.3.1 – Insert and Sign



Select the 'Insert and Sign' icon on the tool bar. The mouse pointer will change from default to cross bar.



Now drag the mouse on the document to the required size and location of the signature field. Upon completion of the selection, the signature field is displayed as shown here and the act-of-signing is initiated.

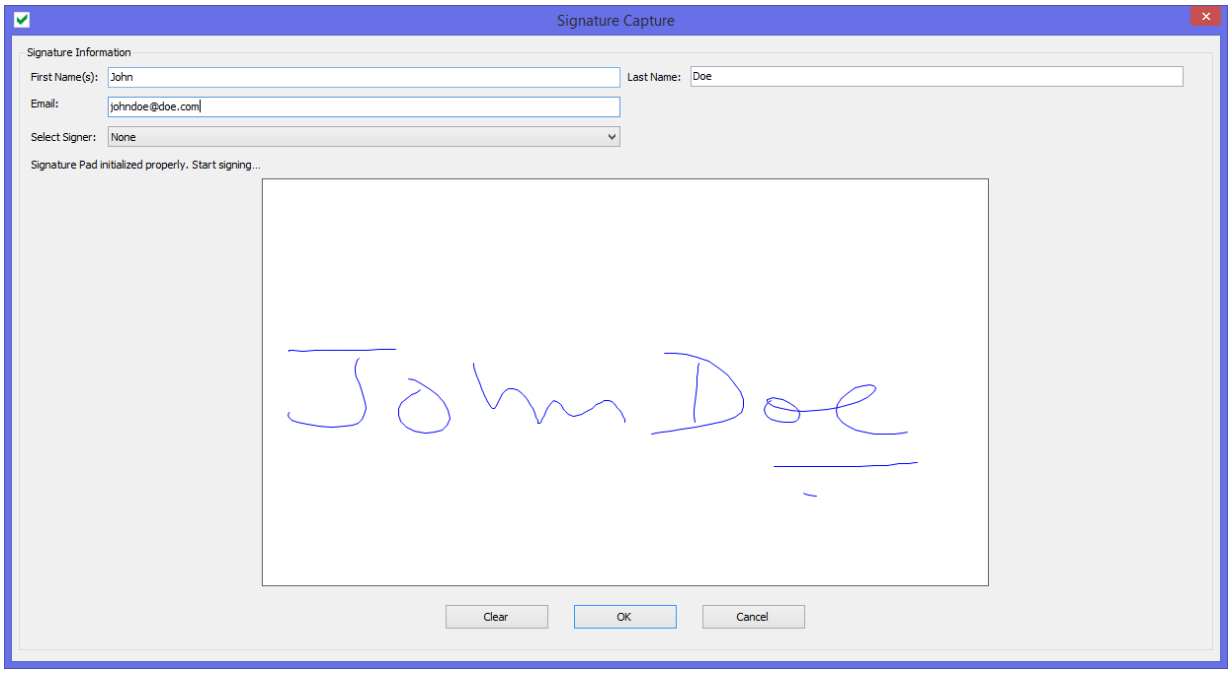
If the signature field size selected is less than 15 pixels (for both width and height), the signature field is treated as invalid and a message is shown saying “You are trying to create a signature field that is too small. Please create a larger signature field”.

3.3.2 – Signature Capture Process

During the signature capture process, additional information like First Name, Last Name and Email can optionally be input or one can select a pre created signer from the list of signers (see Section 3.3.8).

If the signer is not satisfied with the signature input, one can click on “Clear” and sign again. If the signer wants to abort the act-of-signing, one can click on “Cancel”. Canceling the signature capture process will delete the digital signature field too.

Once the signer is satisfied with the signature input, clicking on “OK” will affix the signature to the document.



The licensed version of pDoc Signer supports signing using Pen Display devices. If a Pen Display device is connected to the PC, the signature capture screen is displayed on the Pen Display (an extended monitor). The signer can use the stylus that is attached to the Pen Display to scribble the signature.

3.3.3 – Validation of Signatures

By default, signatures are validated when you open a PDF in pDoc Signer. An icon appears in the signature field on the document page to indicate the signature status. Further details about the status appear in the Signatures panel and in the Signature Properties dialog box.

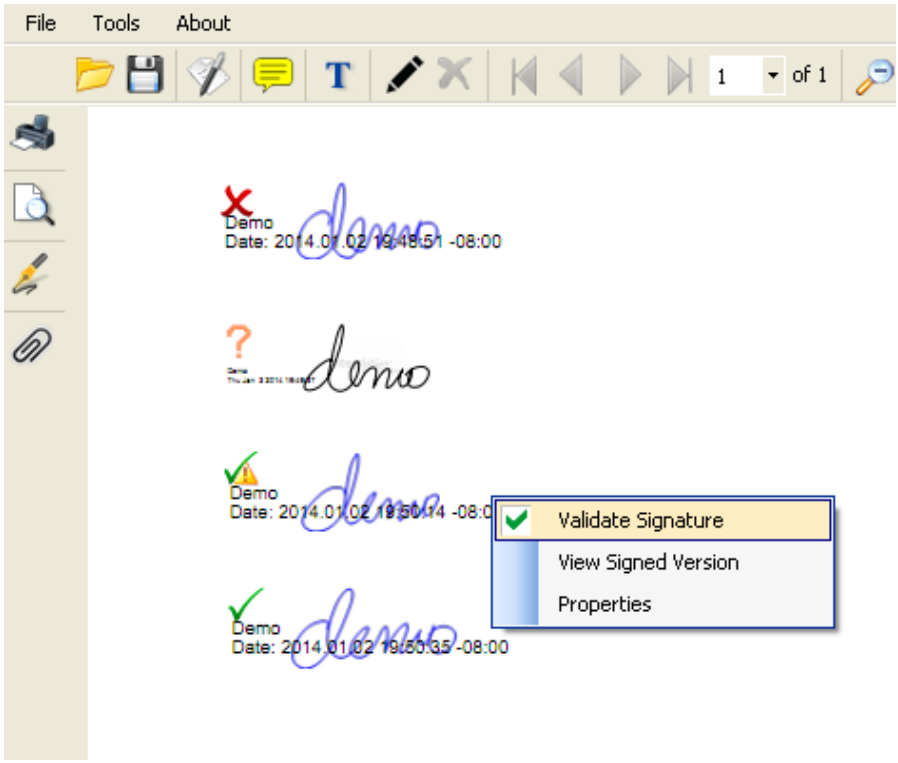
- The digital signature icon Sign Here along with the name of the field in the Signatures panel indicates the presence of an unsigned signature field.
- The check mark icon indicates that the signature is valid.
- The red X icon indicates that the signature is invalid.
- The caution triangle icon indicates that the document was modified after the signature was added.
- The question mark icon indicates that pDoc Signer is not able to verify the signature.

The Signature Properties dialog box can be invoked either by clicking on the Status icon or by right clicking on the Signature Field and then selecting the “Validate Signature” option. Clicking on the “Validate Signature” menu validates the signature first and then displays the Signature Properties dialog box.

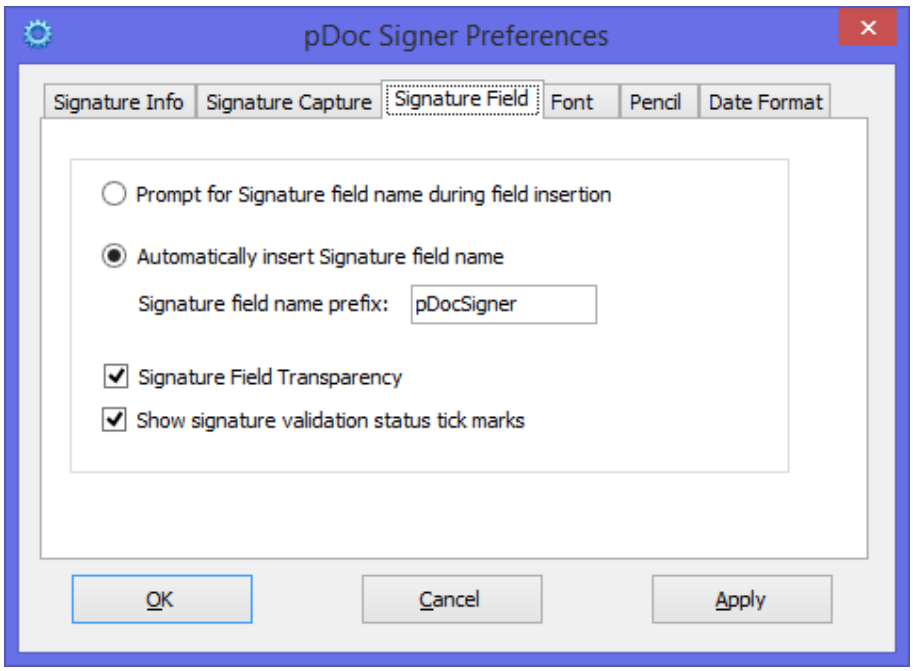
See the screenshots below for reference.

Unsigned Field Icon:

Status icons and validate right click menu:



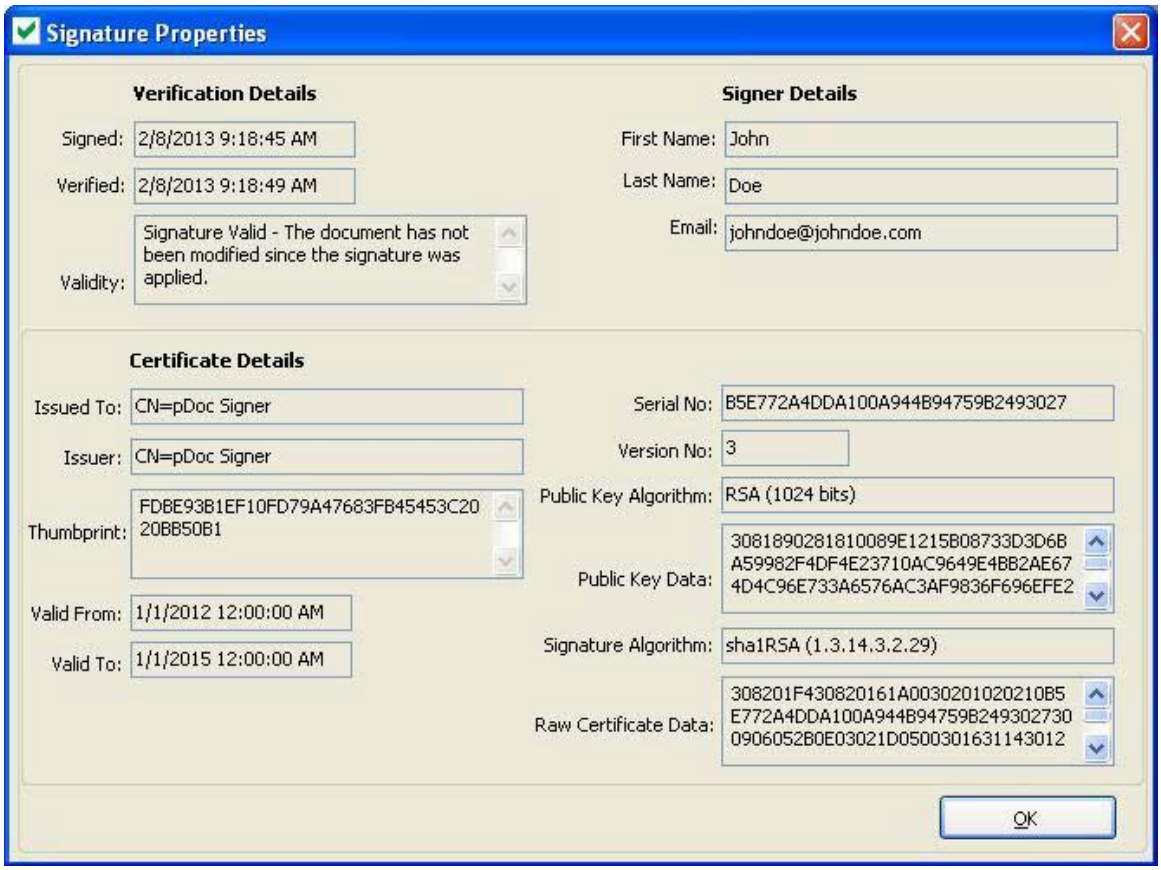
The status icons on the signed signature fields can be turned off by unchecking the option "Show signature validation status tick marks" option in the "Signature Field" tab of the pDoc Signer Preferences screen.



If the option "Show signature validation status tick marks" is unchecked, then depending on the status of the document, the following are displayed in the status bar.

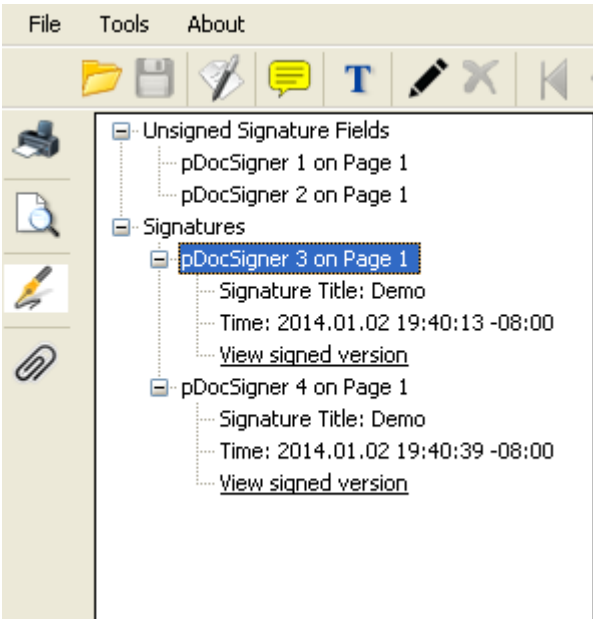
- If no signature is present in the document, then the status is displayed as “Document not signed”
- If only one signature is present in the document and there have been no changes to the document after the signature, then the status is displayed as “Signature valid and document unchanged since signing”.
- If only one signature with subsequent changes is present in the document, then status is displayed as “Signature valid but document has been changed.”
- If more than one signature is present in the document, then status is displayed as “Signatures valid but document has been changed.”
- If one or more signatures are corrupted, then status is displayed as "One or more signatures are invalid."

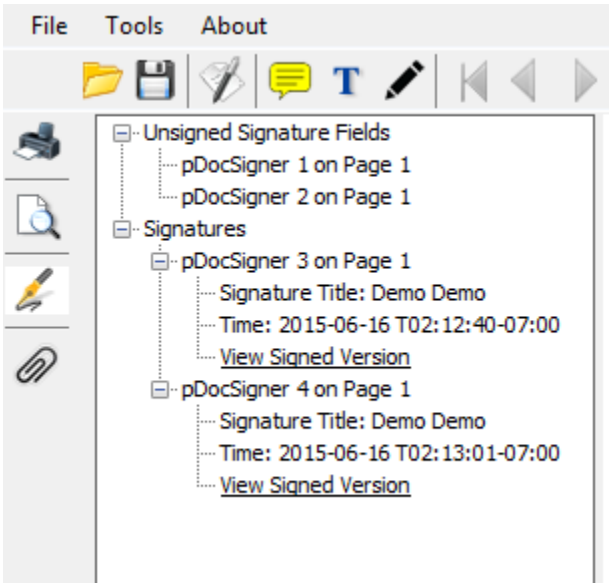
Signature Properties Dialog box:


Signature Properties
Verification Details
Signed: 2/8/2013 9:18:45 AM
Verified: 2/8/2013 9:18:49 AM
Validity: Signature Valid - The document has not been modified since the signature was applied.
Signer Details
First Name: John
Last Name: Doe
Email: johndoe@johndoe.com
Certificate Details
Issued To: CN=pDoc Signer
Issuer: CN=pDoc Signer
Thumbprint: FDBE93B1EF10FD79A47683FB45453C20 20BB50B1
Valid From: 1/1/2012 12:00:00 AM
Valid To: 1/1/2015 12:00:00 AM
Serial No: B5E772A4DDA100A944B94759B2493027
Version No: 3
Public Key Algorithm: RSA (1024 bits)
Public Key Data: 3081890281810089E1215B08733D3D6B A59982F4DF4E23710AC9649E4BB2AE67 4D4C96E733A6576AC3AF9836F696EFE2
Signature Algorithm: sha1RSA (1.3.14.3.2.29)
Raw Certificate Data: 308201F430820161A003020102020 10B5 E772A4DDA100A944B94759B249302730 0906052B0E03021D0500301631143012
OK

3.3.4 – View Signed and Unsigned Signature Fields

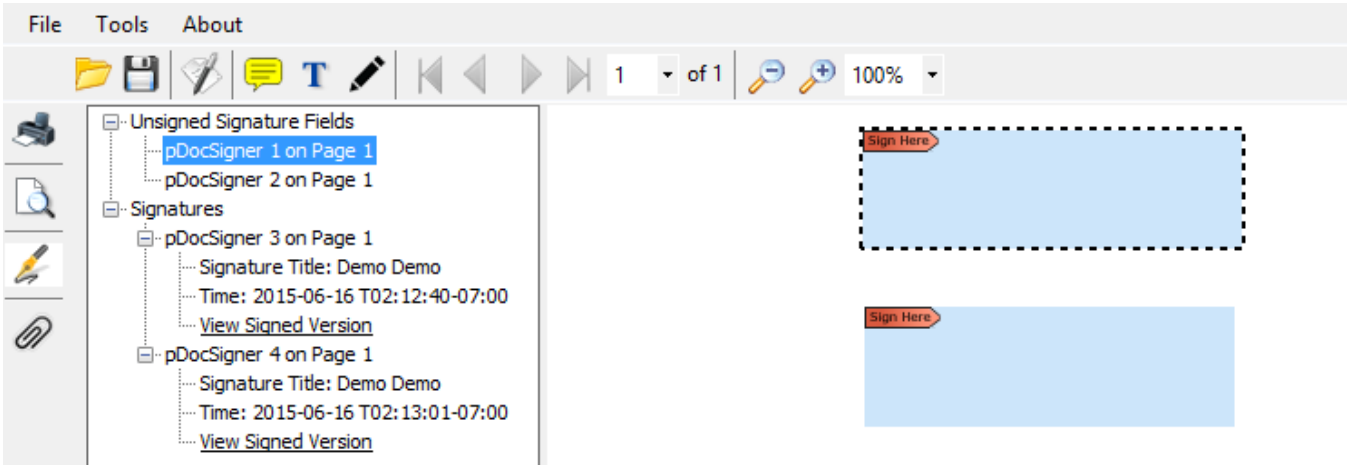
Click on the ‘Signatures’ tool button in the left pane to open the signature panel. The width of the signature panel can be increased or decreased as required by using the splitter between the panel

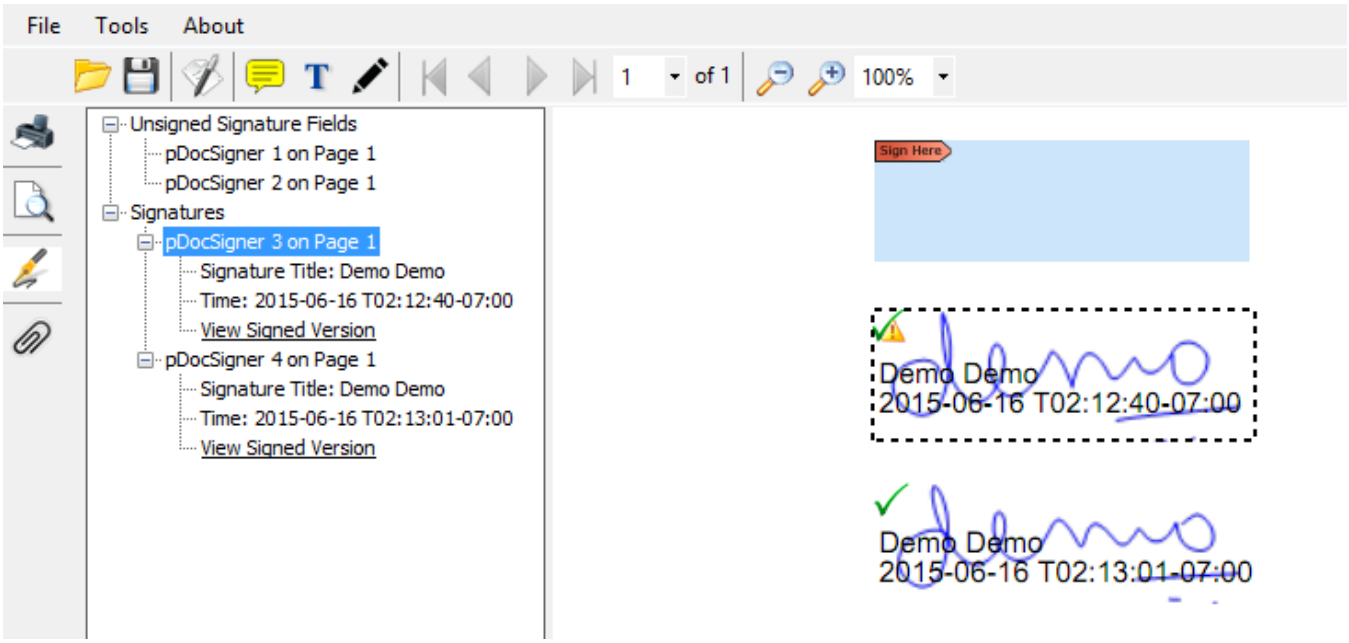




and the document page. The list of signed and unsigned signature fields along with details is displayed.

If we click on any of the signature fields in the list, the corresponding blank or signed signature field in the document will be highlighted as shown in the screenshots below. Close the signature panel by clicking again on the ‘Signatures’ tool button.





One can also use the arrow keys (i.e., up and down) or the TAB key to navigate through the list of signatures in the signature panel and select a signature.

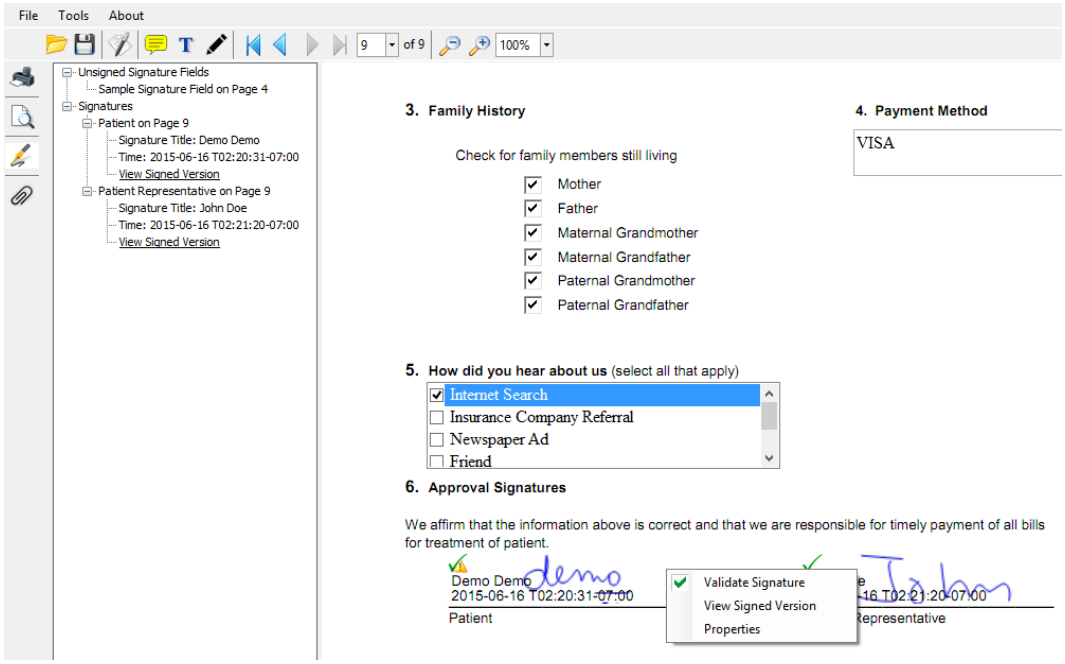
3.3.5 – Viewing Previous Versions of a Signed Document

Each time a document is signed in pDoc Signer, a signed version of the PDF is saved with the PDF. Each version is saved as append-only so that it cannot be modified. In pDoc Signer, the corresponding signed version of a signature can be viewed using the two following options.

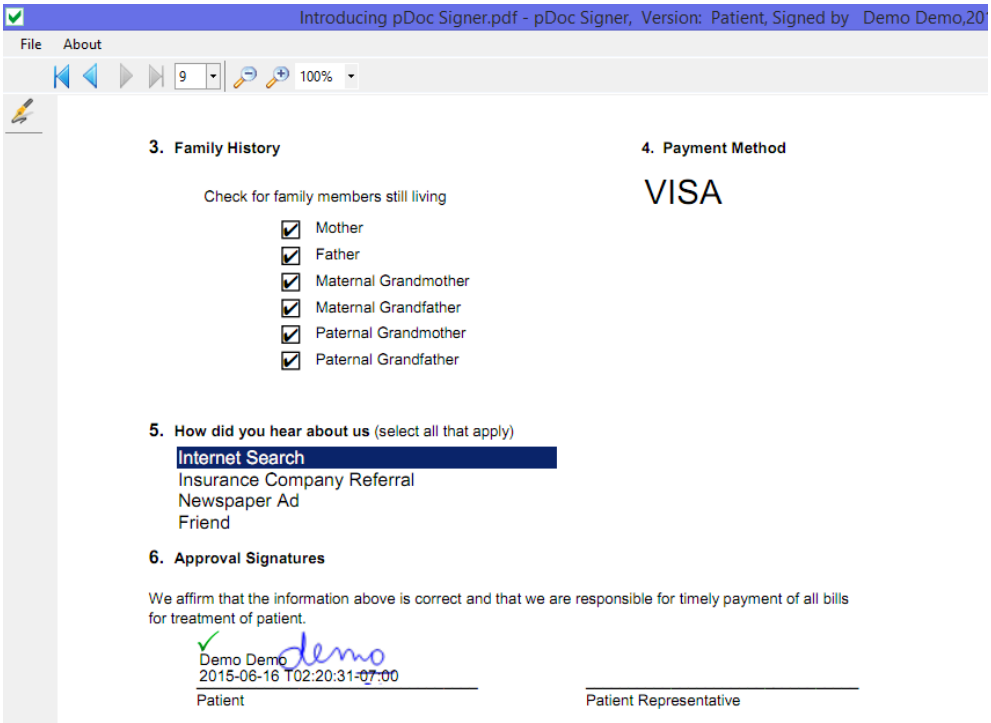
1. In the Signatures panel, select the signature, and click on the “View signed version” option available in the details of the signature.

2. Right click on the signed signature field and select “View Signed Version” from the list of available options.

See the screenshot here that displays the options mentioned above.



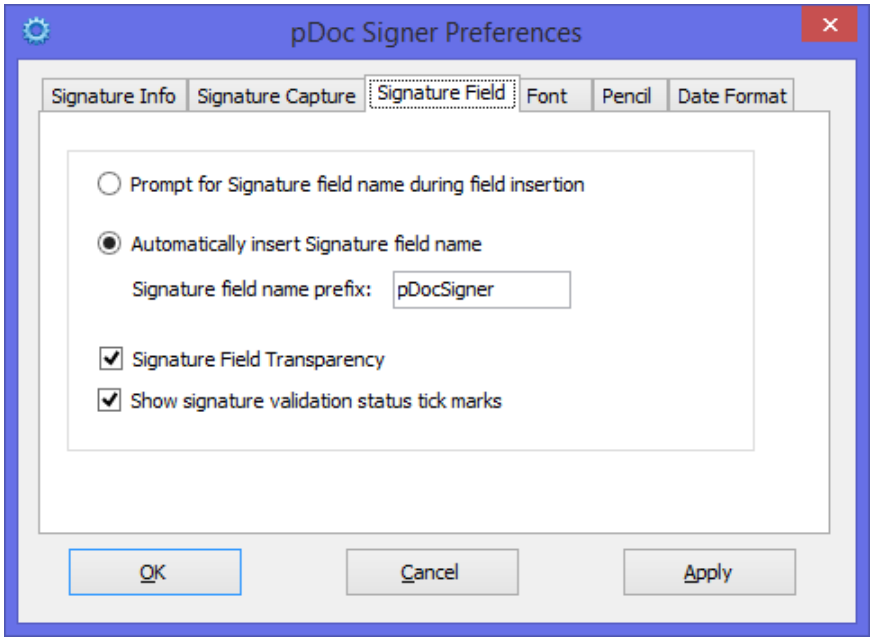
Selecting one of the options specified above displays the signed version PDF in another instance of pDoc Signer in which the only options available to the user are scrolling through the document, zooming, the signature panel as shown below and saving the PDF using “Save As” option if required.



3.3.6 – Specifying Signature Field Options

Each Signature Field must have a name associated with it. pDoc Signer can assign a name to a signature field automatically when a Signature Field is inserted into a PDF document if a "Prefix" for Name is supplied. Another alternative is to provide a name for the signature field when inserted manually. These options can be set in the "Signature Field" tab under "Tools→Preferences".

If the option 'prompt for Signature field name during field insertion' is selected, a window prompting for a Name for the signature field gets displayed when a signature field is inserted in the PDF document using pDoc Signer.



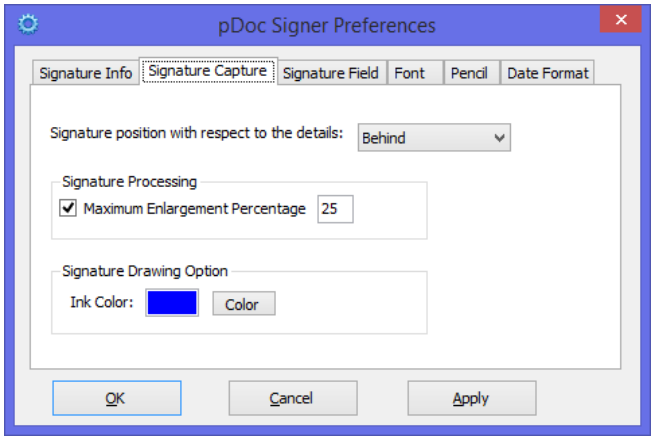
If the option 'Automatically insert Signature field name' is selected, then the signature field name Prefix will be appended with the next number in the sequence of created form fields and set as signature field name for both the blank signature field and during signing.

Select the "Signature Field Transparency" option if the signature field should be transparent on the PDF document. The option is checked on by default.

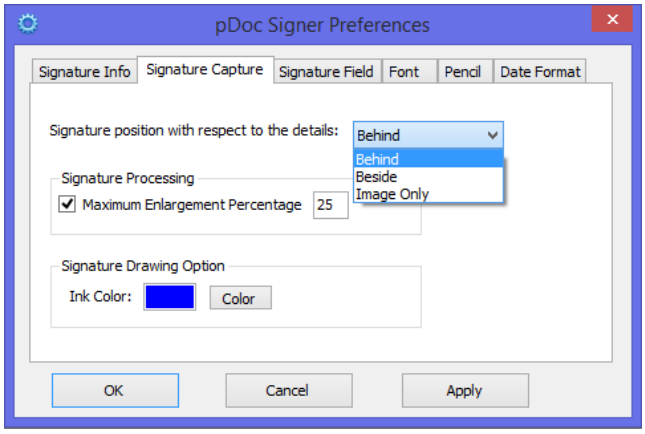
Select the "Show signature validation status tick marks" if the signature status icon should be displayed on signed signature fields.

3.3.7 – Signature Capture Options

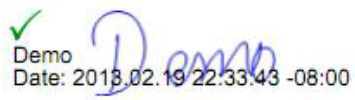
To set the Signature Capture options, go to “Tools→Preferences”.



Select the signature position with respect to the signature details, i.e., the signer name and the date/time the signature was collected. The three options available are “Behind”, “Beside”, and “Image Only”.



If the option “Behind” is selected, the signature details are placed at the center of the signature field with the signature squiggle behind the details as shown below.

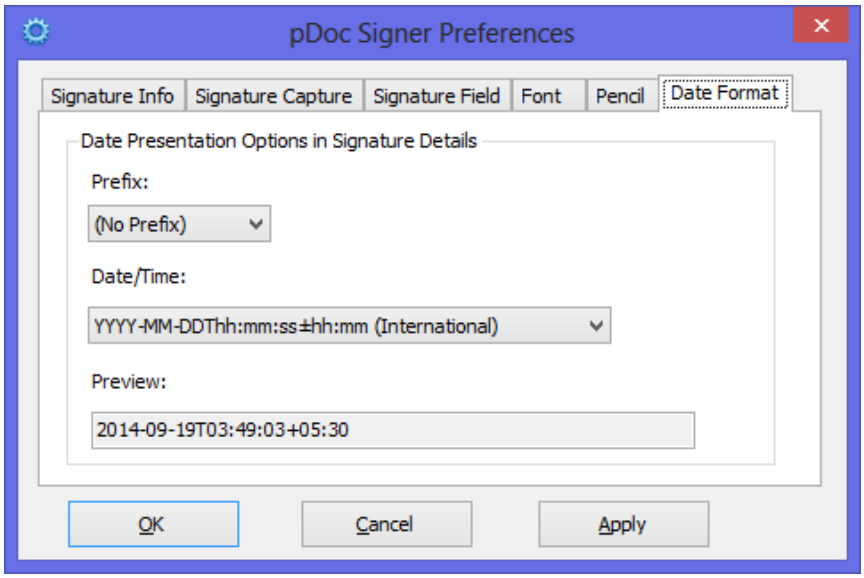


If the option “Beside” is selected, the signature squiggle is shown on the left side of the field and the details are shown on the right side of the signature field as shown below.

If the option “Image Only” is selected, only the signature squiggle is shown in the Signature Field and details are not shown.

One can specify if the Maximum enlargement feature is enabled or not and also specify the maximum enlargement percentage. The Maximum Enlargement Percentage is used only in cases where the size of signature on the signature pad (after white space removal) is smaller than the size of the Signature Field in the document. When the signature drawn on the signature pad is smaller than the size of the Signature Field in the document, pDoc Signer will enlarge the signature to fill the Signature Field. However, it will limit the enlargement to the value of the Maximum Enlargement Percentage. The Maximum Enlargement Percentage specifies the percentage of the destination to use in such cases. This prevents the signature from looking too pixelated or jagged. The value of the maximum enlargement percentage can be between 0 and 100. If a value of 0 is specified, the signature is not enlarged at all. If a value of 100 is specified, the signature is enlarged to fit the complete destination.

One can also specify the default ink color for the signatures in this screen by clicking on the “Color” button. The default color is Blue. The Prefix and Date/Time format for date presentation in signature details can be specified in the “Date Format” tab of the Preferences screen.



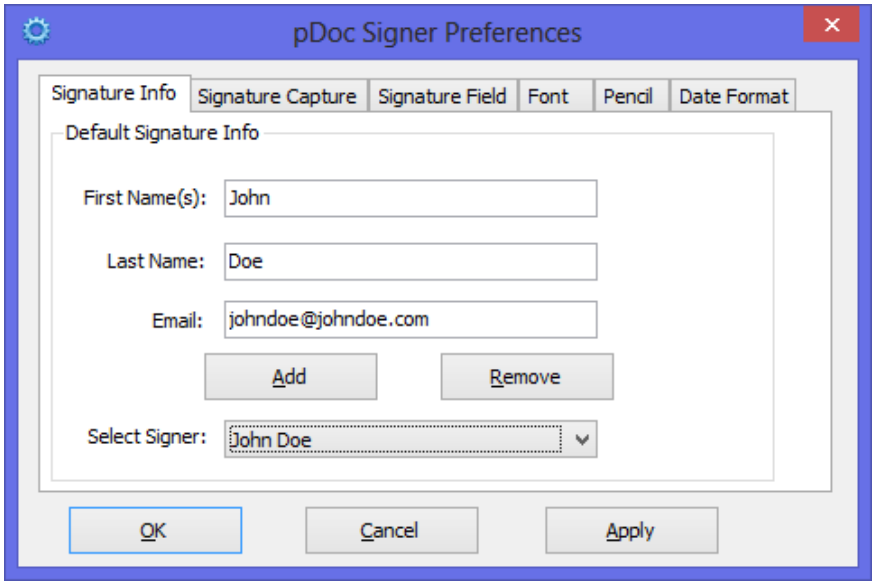
Note: The display of Signature Title and the time/date stamp is on by default and non-removable for “Behind” and “Beside” options. But, if the height of the signature field is less than 30 pixels or the width of the signature field is less than 50 pixels, then the signature details (i.e., Signature Title and Date/time stamp) are not printed on the signature.

3.3.8 – Signature Information

1. Creation of List of Signers

This feature can be used to create a list of signers for the purposes of signing. During signing, in the signature capture screen, the list of signers available is displayed and a signer can be selected from the list. Each profile contains First Name, Last Name and Email of the signer. To create a profile, enter the required information and then click on the “Add” button. Once created, the Signer Information (i.e. First Name and Last Name) is added to the Signers List.

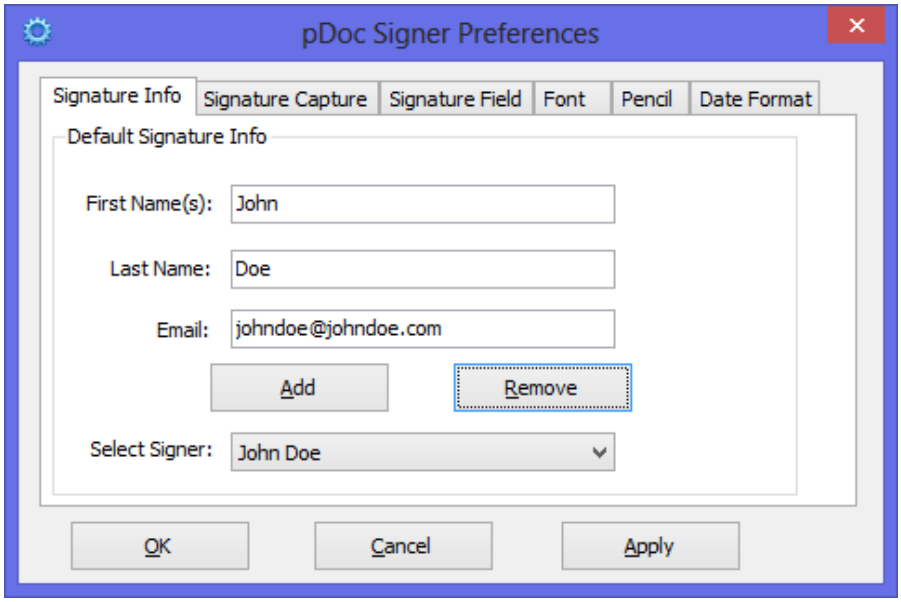
A maximum of 10 profiles can be created here for use while signing.



To make a signer the default signer, select the Signer from the available list of Signers and then click on OK. During the signature capture process, the selected signer information is pre-filled in the signature capture window.

2. **Remove a Signer from the List**

   To remove a signer from the list, select the signer from the available list and then click on the “Remove” button.



3.3.9 – Automatic Configuration of Certificate

pDoc Signer provides a default certificate for signing. The default certificate will be configured automatically during the installation of the pDoc Signer. If the user wants to change the certificate during signing, the user needs to go the “Select Certificate for Signing” in the “File Menu” and configure the certificate as shown in the certificate selection section.

3.3.10 – Certificate Selection

Signing in pDoc Signer requires the use of a digital certificate. During its installation process, pDoc Signer automatically installs and configures a certificate that is used by default for signing. Users should select a different certificate that represents their organization. To select another certificate for signing, go to “File →Select Certificate for Signing...”. Selecting that option opens a window titled Select Certificate for Signing. In that window, the certificate path (i.e., PFX Path) to the previously selected certificate (or to the default certificate) will be shown. By default, the certificate path is set to the certificate (i.e., pDocSigner.pfx) that is installed and configured automatically during the pDoc Signer installation; the password for the default certificate is “pdocsigner”.

To select another certificate for signing, browse to that certificate with the Browse button, then enter the password in the Password text box, and click on the OK button.

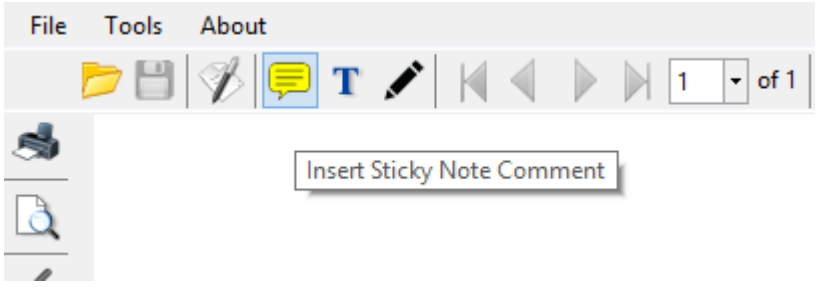
3.4 – Sticky Note Comments

pDoc Signer allows insertion of sticky note comments in a PDF document. Sticky note comments are notes that communicate ideas or provide feedback for PDFs. You can type a text message using the sticky note comment tool. Text editing tools let you add editing marks to indicate changes you want in the source document.

Most comments include two parts: the icon, or markup, that appears on the page and the text message that appears in a pop-up note when you double-click the icon.

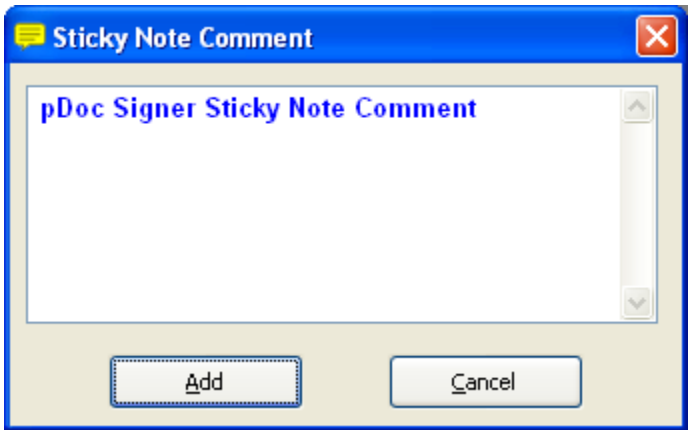
3.4.1 – Adding Sticky Note Comments

Click on the sticky note comment tool button. The mouse pointer changes from the normal default arrow to an arrow with a sticky note comments icon attached to it. The sticky note comment field button is shown in the image below.

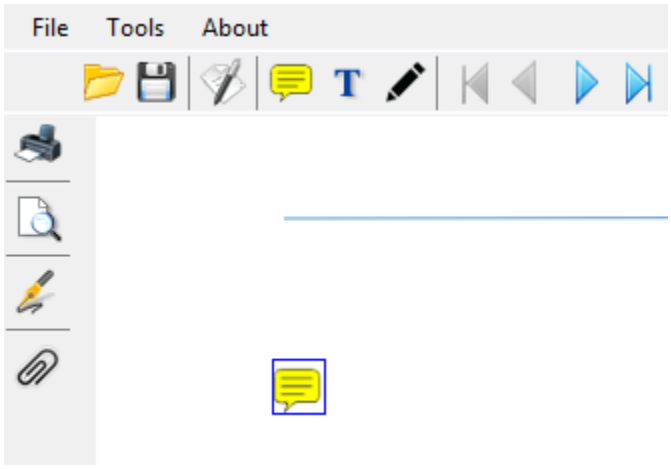


Now click on the document where the sticky note comment field is required. A window is displayed wherein the user can add the text for the comment.

The image below shows the sticky note comments input window.

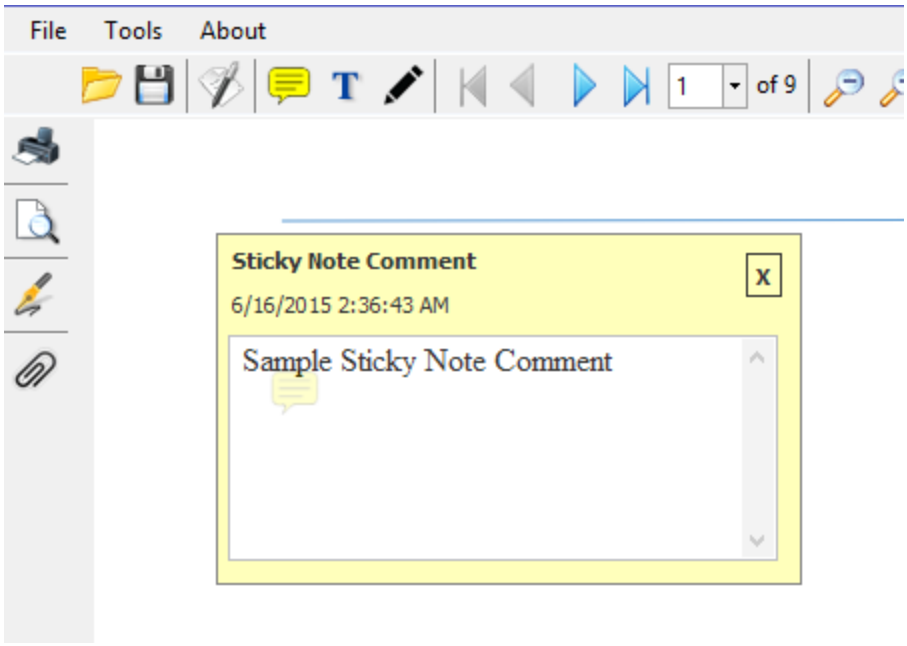


Upon acceptance, a sticky note comment icon will be displayed on the document at the specified location which indicates that the sticky note comment field is added in that position.



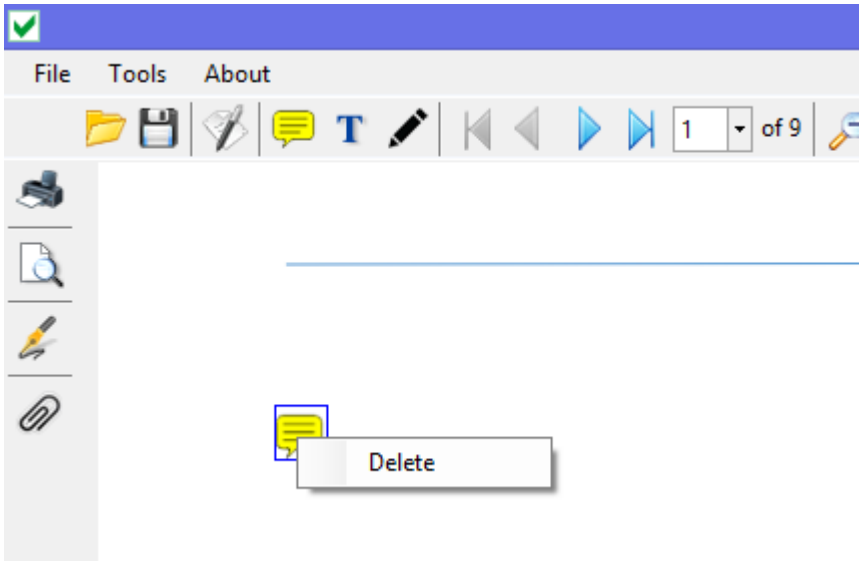
3.4.2 – Viewing Sticky Note Comments

Double click on any sticky note comment icon on the document. Sticky note comments corresponding to the selected sticky note comment icon are displayed in a separate transparent window.



3.4.3 – Deleting Sticky Note Comments

To delete a Sticky Note Comment, select the comment and then right click on it. Select the “Delete” option. The user is prompted with a confirmation message that says "Do you want to delete the selected Sticky Note Comment?" Upon Clicking “Yes” the sticky note comment will be deleted.



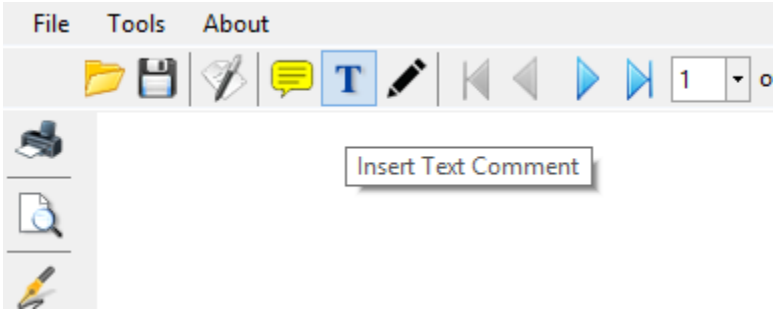
Note: You cannot delete a sticky note comment if the PDF document contains at least one signed signature field or if the PDF is secured.

3.5 – Text Comments

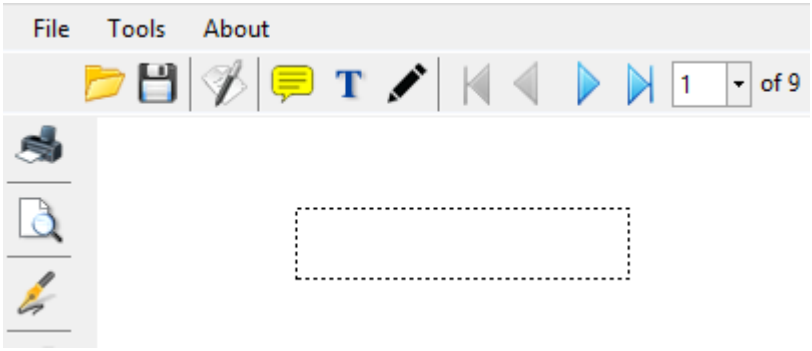
pDoc Signer allows insertion of Text Comments in a PDF document. Text Comments are notes that communicate ideas or provide feedback in PDFs. You can type a text message using the Text Comment tool. Text editing tools let you add editing marks to indicate changes you want in the source document.

3.5.1 – Adding Text Comments

Click on the text comments tool button (the capital letter “T”). The mouse pointer changes from the normal default arrow to cross hair. The text comments field button is shown in the image below.



Now drag the mouse on the document to the required size and location of the text comments field. Upon completion of the selection, the text comments field is displayed as shown below and the text comments input window is displayed.



Using your keyboard, enter the text for the comment. Font attributes specified in the Preferences windows for comments are applied for the text entered in this window.

Click on the “Add” button to the text comment to the PDF. The screenshot below shows the text comments added in the PDF document.

Note:

1. If the text comments field size selected is smaller than 15 pixels wide and 5 pixels high, the text comments field is treated as invalid and a message is shown saying “You are trying to create a text comment field that is too small. Please create a larger text comment field”.
2. Text lines that are longer than the width of the text field are truncated by standard convention; they do not automatically wrap to the next line, so you should use line returns for multi-line comments.

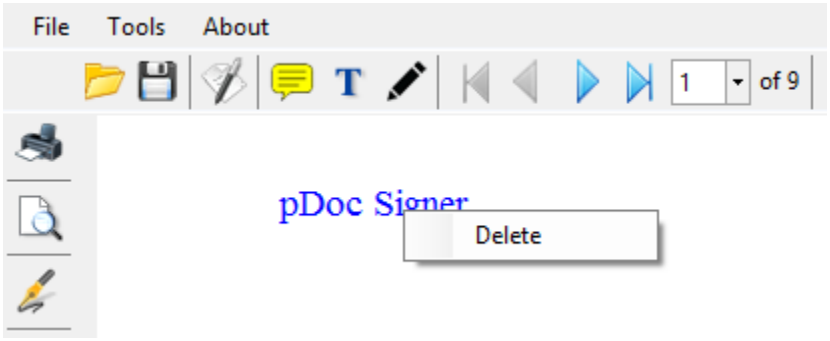
3.5.2 – Updating Text Comments

The existing text comments can be updated in pDoc Signer. Click on the text comment and alter the text as required. The updated text is applied to the text comment when the PDF is saved. The screenshot below shows a text comment after updates.

Note: Text comments in place when the document is signed will not be editable after signing; however, after a document is signed new text comments can be added, but they cannot be modified after addition.

3.5.3 – Deleting Text Comments

To delete a Text Comment, select the comment and then right click on it. Select the “Delete” option. The user is prompted with a confirmation message that says "Do you want to delete the selected Text Comment?" Upon Clicking “Yes” the Text Comment will be deleted.



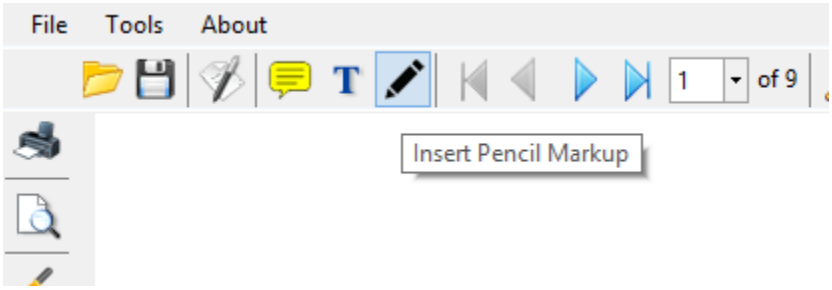
Note: You cannot delete a text comment if the PDF document contains at least one signed signature field or if the PDF is secured.

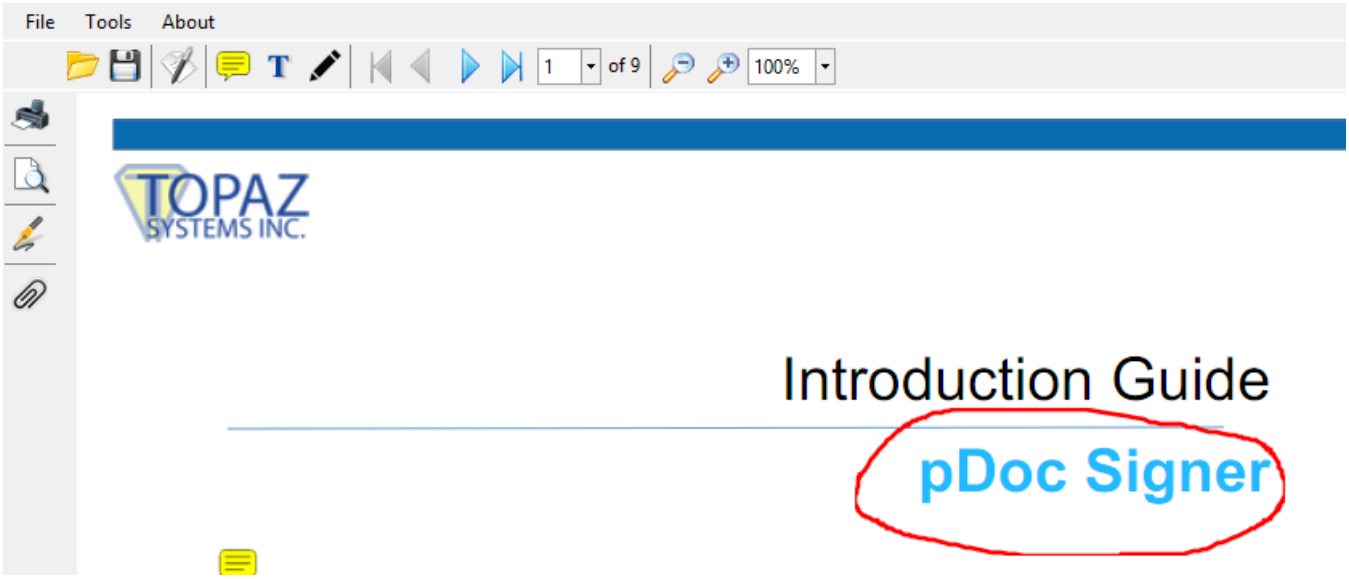
3.6 – Pencil Tool

The Pencil tool creates free-form drawings and the Pencil Eraser tool removes the pencil markups.

3.6.1 – Draw Pencil Markup

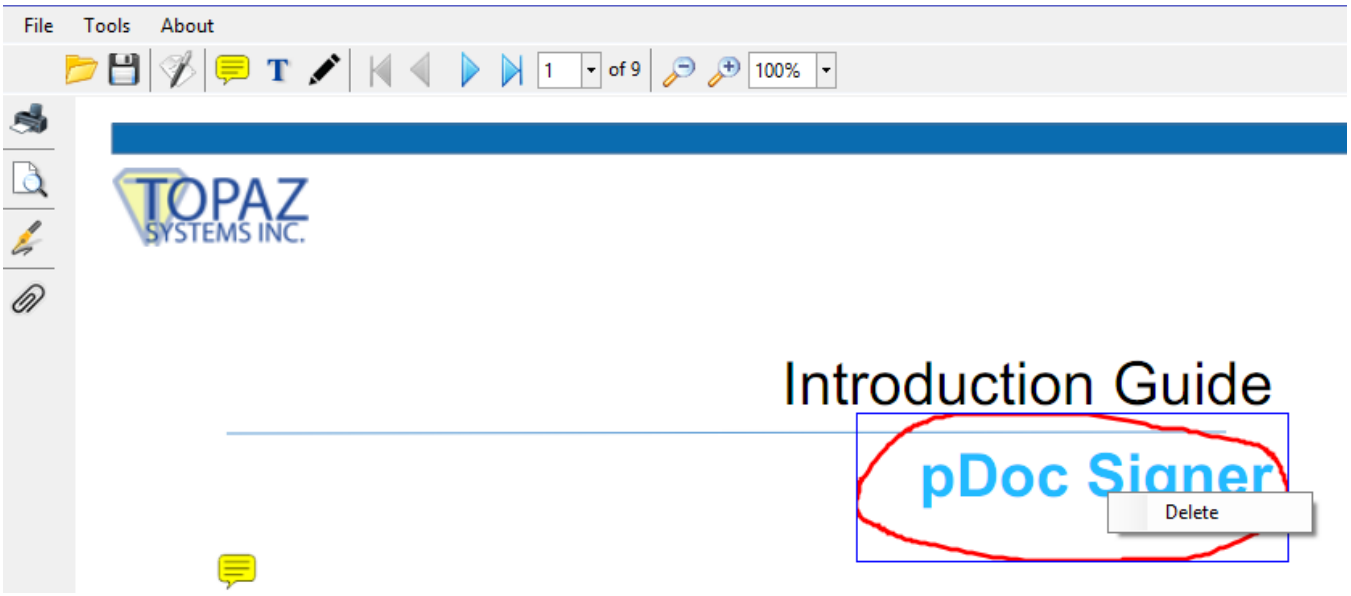
Click on the pencil tool. The mouse pointer changes from the default pointer to a cross bar. Drag where you want to begin drawing and release the mouse button where the pencil line should end. The pencil markup with selected color and width will be drawn on the page.





3.6.2 – Delete Pencil Markup

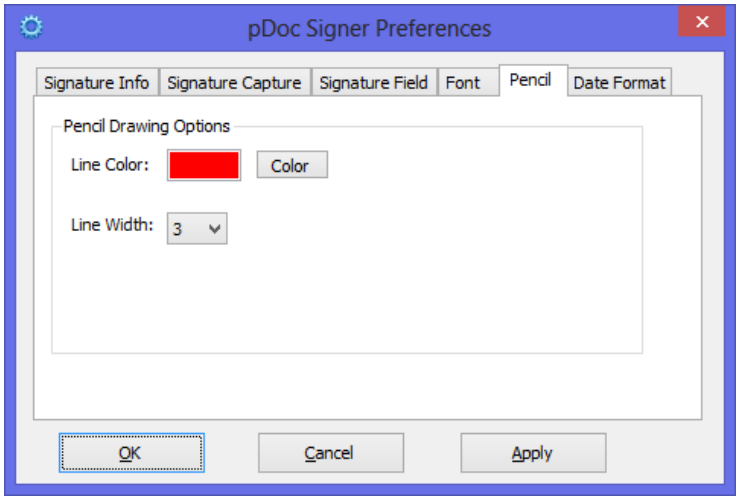
To delete a Pencil Markup, select the markup and then right click on it. Select the “Delete” option. The user is prompted with a confirmation message that says "Do you want to delete the selected Pencil Markup?" Upon Clicking “Yes” the Pencil Markup will be deleted.



Note: You cannot delete a pencil markup if the PDF document contains at least one signed signature field or if the PDF is secured.

3.6.3 – Settings For Using the Pencil Tool

To specify the line width and line color for pencil markups, go to “Tools→Preferences”. Click on the ‘Pencil’ tab, select the Pencil line color and width of the line and click on ‘Apply’.

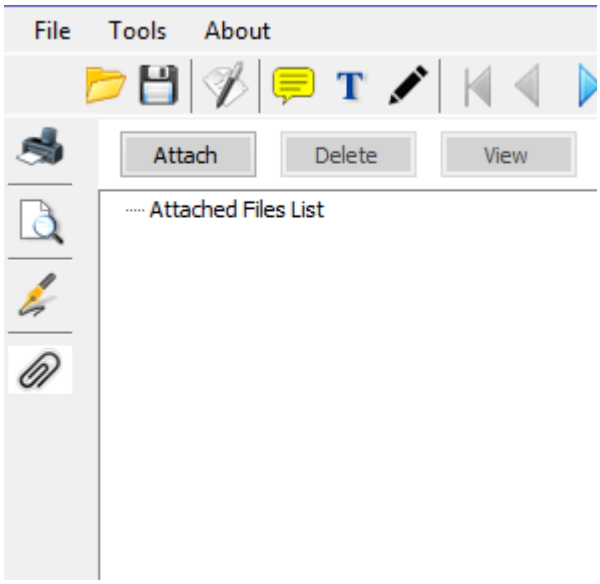


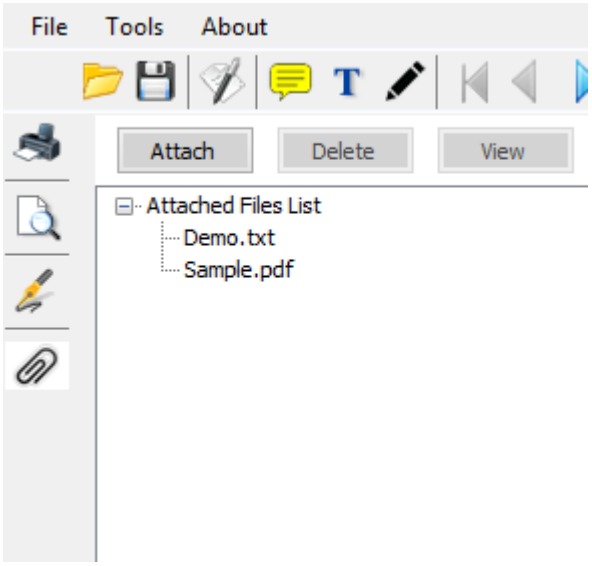
3.7 - Attachments

One can attach PDF documents and other types of files to a PDF. If you move the PDF to a new location, the attachments move with it.

Click on the ‘Attachments’ tool button at the left pane to open the Attachments panel. The existing attachments list with ‘Attach’, ‘Delete’ and ‘View’ buttons are displayed.

3.7.1 – Adding Attachments

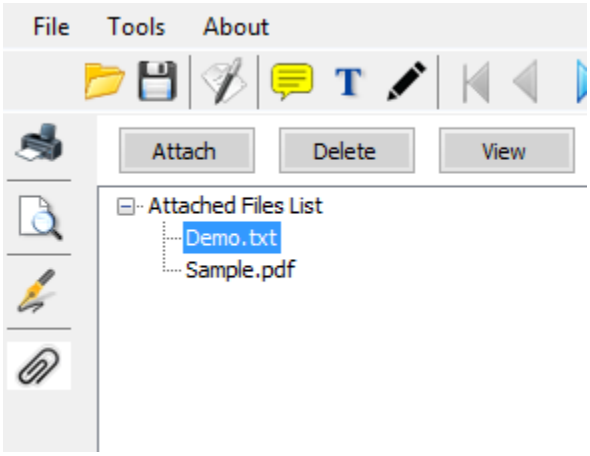




Clicking on the ‘Attach’ button will open a file dialog. Select the file to be attached to the PDF document and click “OK”. The selected file will be attached to the document and the attached file list will be updated.

3.7.2 – Delete Attachments

Select the attachment to be deleted from the list. Now click on the ‘Delete’ button present in the Attachments panel to delete the attachment. The selected file will be deleted and the attached files list will be updated.



Note: You cannot delete a file attachment if the PDF document contains at least one signed signature field or if the PDF is secured.

3.7.3 – View Attachments

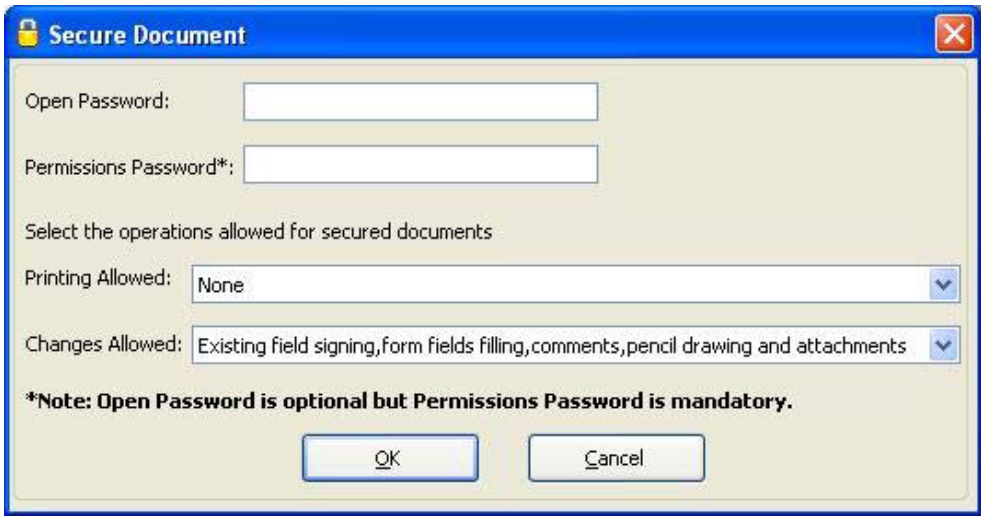
To view an existing attachment, select the attachment and click on the ‘View’ button in the Attachments panel. If the attachment is a PDF, it is opened in another instance of pDoc Signer. For other types of attachments, the attachment is opened in their respective application.

3.8 – Securing Documents

pDoc Signer can be used to secure an unsecured and unsigned PDF.

For securing a document, go to “File→Secure Document”. The secure document dialog is displayed. Provide either “Permissions Password” or both “Open Password” and “Permissions Password”. “Permissions Password” is mandatory. The default operations allowed for secured documents are printing is not allowed and form filling and signing, comments, pencil drawing and attachments are allowed.

Upon clicking “OK”, the document is secured with the information provided and is closed. The secured document must be opened again for further use in the pDoc Signer tool.



Open Password: One will be prompted to enter this password when the document is being opened.

Permissions Password: One will need to provide this password if permissions on the document need to be modified at a later point of time in other PDF containers. Permissions password once provided cannot be changed in pDoc Signer.

Printing Allowed: Two options are available for the user to select print permissions.

None: If the user selects the “None” option in the printing allowed, the secured documents are not allowed for printing.

Allow Printing: If the user selects the “Allow Printing” option in the printing allowed, the secured documents are allowed from printing.

Changes Allowed: Five options are available for the user to select the changes allowed on the PDF.

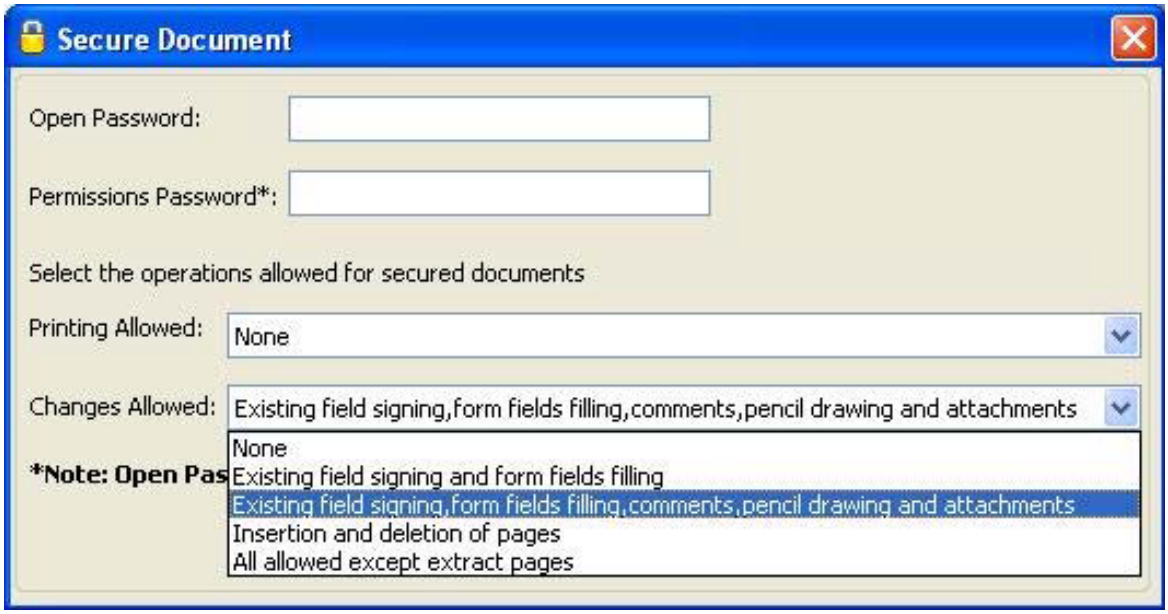
None: If the user selects the “None” option in the changes allowed, no changes are allowed on the PDF after securing the PDF.

Existing field signing and form fields filling: If the user selects the “Existing field signing and form fields filling” option, the secured document will allow existing form field filling and signing of existing blank signature fields. All other operations are disabled.

Existing field signing, form fields filling, comments, pencil drawing and attachments: If the user selects the “Existing field signing, form fields filling, comments, pencil drawing and attachments” option, the secured document will allow existing form fields filling, signing of existing blank signature fields, insertion of comments, insertion of pencil drawing and adding attachments in the secured documents. All other operations are disabled.

Insertion and deletion of pages: If the user selects the “Insertion and deletion of pages” option, the secured document will allow only insertion of the pages and deletion of the pages in the “Manipulate Pages”. All other operations are disabled.

All allowed except extract pages: If the user selects the “All allowed except extract pages” option, the secured document will allow all the operations except “Extract Pages” in the “Manipulate Pages”.



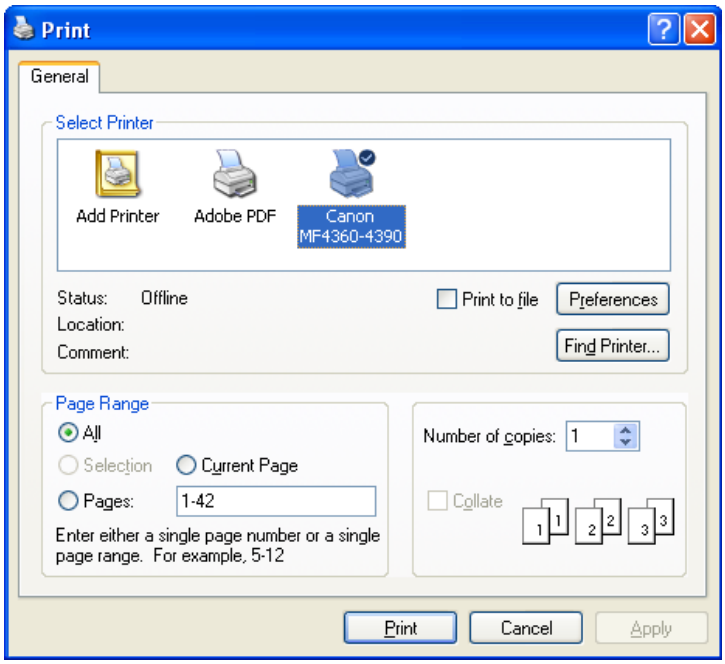
3.8.1 – Opening Secured Documents

When opening a document having “Open Password”, a dialog is displayed prompting for “Open Password” to open the document. If the user provides the correct password, then the document is opened, otherwise an error message will be displayed.

If the document being opened had a “Permissions Password” too, features of pDoc Signer are enabled or disabled based on the Permissions set while securing the PDF. If the document being opened has only the “Permissions Password”, the password dialog is not displayed, but features of pDoc Signer are enabled or disabled based on the Permissions set while securing the PDF.

3.9 – Printing and Print Preview

To print the opened PDF document from pDoc Signer, click on the ‘Print’ tool button on the vertical toolbar or go to “File→Print”. The print dialog will be opened. Select the Printer, one of the options All, Current Page, or Page Range, and click on Print. The document pages are printed on the selected printer.

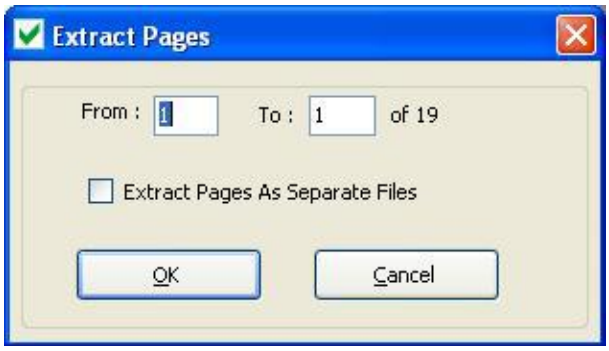


To view the appearance of the printed document before actually printing it, the “Print Preview” function can be used. This function can be invoked from “File -> Print Preview” or the “Print Preview” tool button on the vertical toolbar. Clicking on “Print Preview” opens a window that displays the document as it will be printed. The only toolbar icons available in this window are for page navigation and printing the document. To print a document in the Print Preview window, simply click on the Print icon.

3.10 – Merging and Splitting of PDF Documents

3.10.1 – Extract Pages

To extract (copy) pages from the opened PDF document, go to “Tools→Manipulate Pages→Extract pages”. In the Extract Pages dialog, select the page range (i.e., starting page to ending page) and click the “OK” button. A dialog prompting the user to select the folder



where the new PDFs should be created is displayed.

Once the folder is specified, the selected pages will be embedded into the new PDF with same name as the original PDF and having a suffix “_Extract”. For example, if the opened PDF name is “Demo.pdf”, the new PDF name would be “Demo_Extract.pdf”. If the option “Extract Pages as Separate Files” is selected, each of the pages is exported into a new PDF document, and the page number is appended to the file name for each page in the document.

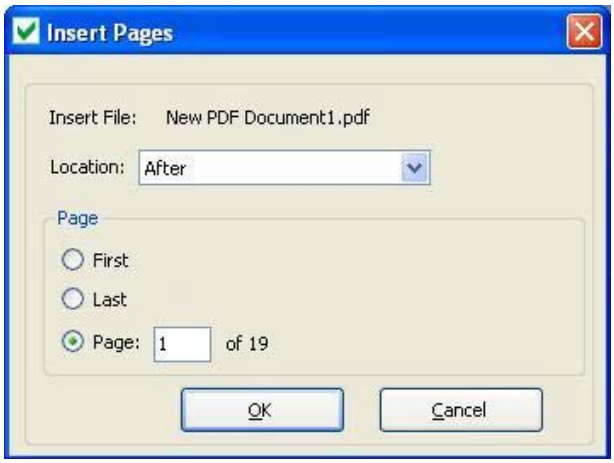
Note: Any signature fields (both unsigned and signed) existing in the page are removed from the page during the extraction process. Signature Fields should be inserted again if required.

3.10.2 – Delete Pages

To delete pages from the opened PDF document, go to “Tools →Manipulate Pages→Delete pages”. In the Delete Pages dialog, select the page range (i.e., starting page to ending page) and click the “OK” button. Upon clicking OK, the selected pages will be permanently deleted from the opened PDF.

3.10.3 – Insert Pages

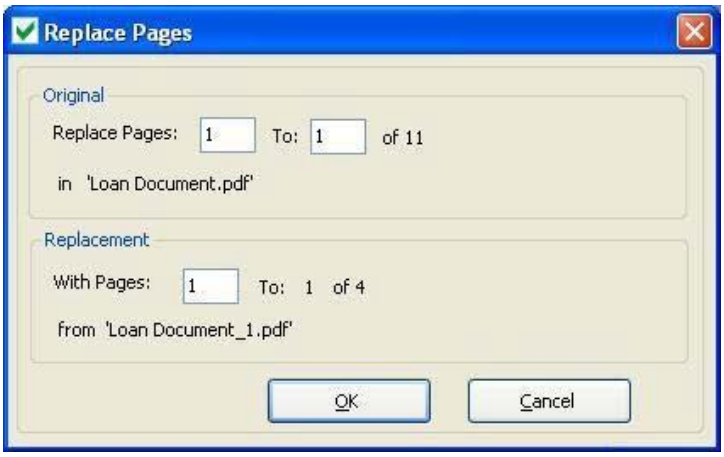
To insert pages into the opened PDF document, go to “Tools→Manipulate Pages→Insert Pages”. Select the PDF file from which the pages will be inserted in to the opened PDF document from the file dialog. The Insert Pages dialog will be opened, select the location at which the page will be inserted (i.e., after or before). Select the page number at which the pages will be inserted (i.e. First or Last or page number). The selected PDF pages will be inserted in the specified location.



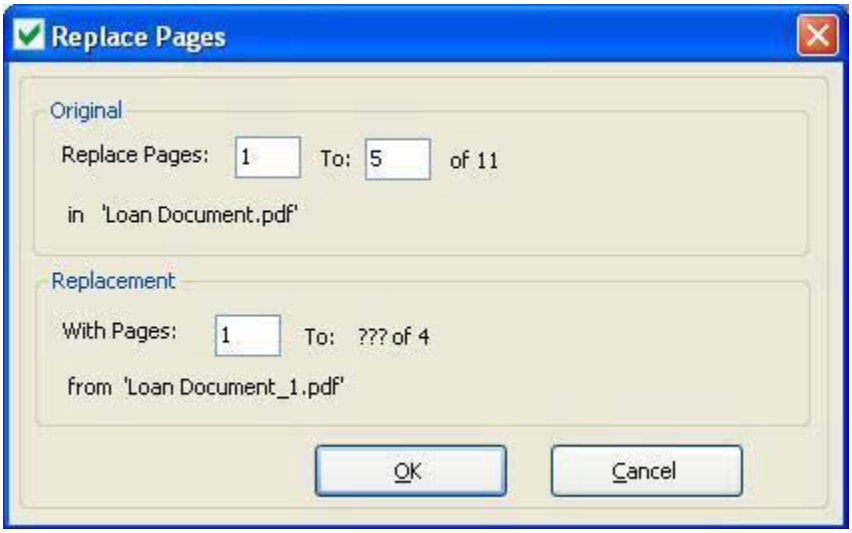
3.10.4 – Replace Pages

To replace the pages in the opened PDF document with the selected pages from another PDF document, go to “Tools→Manipulate Pages→Replace Pages”. Select the document that contains the replacement pages and click “Open”. Once the document containing the replacement pages is selected, the Replace Pages dialog will be opened.

In the Replace Pages dialog, under Original, specify the pages you want to replace. Under Replacement, specify the beginning page as shown in the image at right.

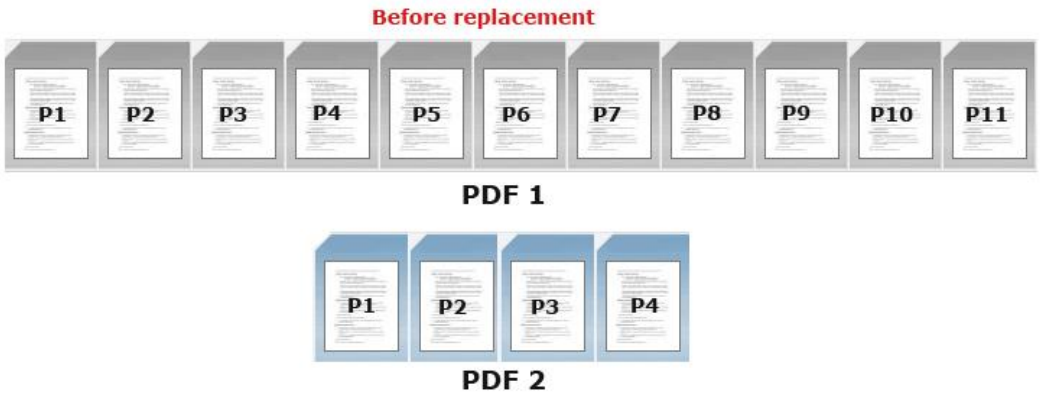


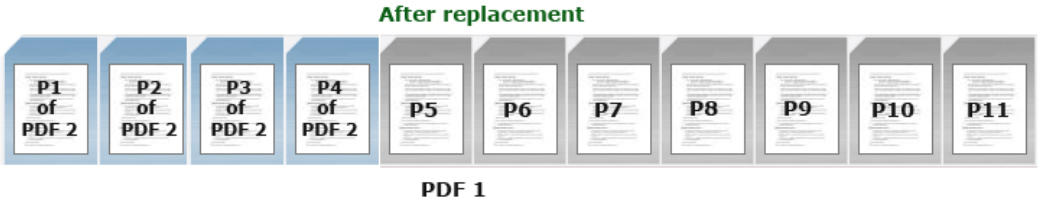
Case 1: Page Range to be replaced is more than the total number of pages of the Replacement document.



In the above figure, replace pages are from Page 1 to 5, but in the replacement PDF document we have only 4 pages.

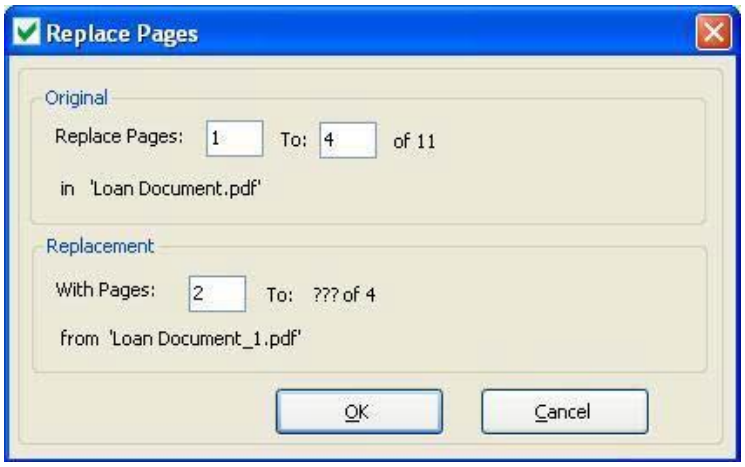
In this case, only the first 4 pages of the original document are replaced with the 4 pages from the replacement document and the 5th page of the original document would remain as-is. The following screens display the original PDF document before the replacement operation and after the replacement operation.





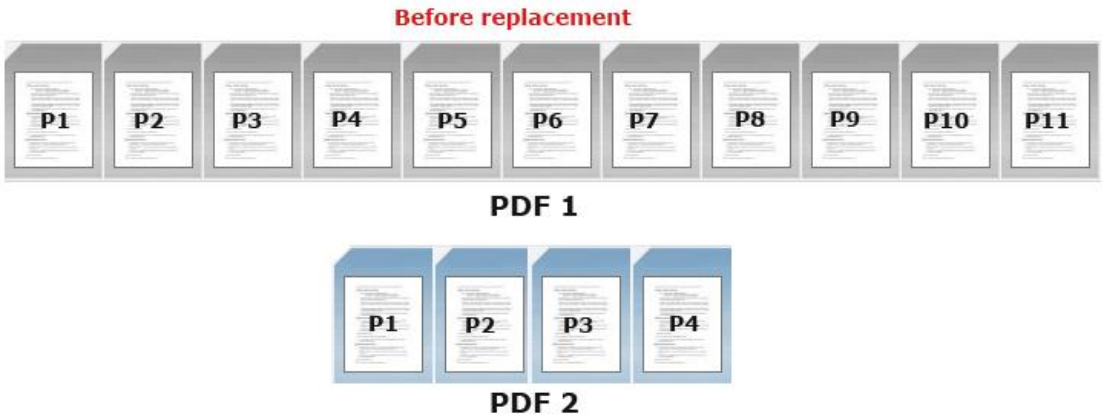
Case 2: Page Range to be replaced is same as the total number of pages of the Replacement document, but the starting page is not the first page.

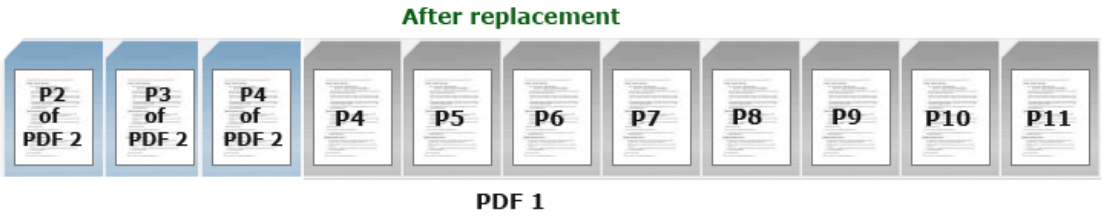
In the figure at right, pages to be replaced are from 1 to 4.



The total number of pages in the replacement PDF document is 4. But the starting page specified in the replacement document is 2, which indicates that only three pages from the replacement document are available for replacement. In this case only 3 pages of the original document will be replaced by the 3 pages of the replacement PDF document. The 1st page of the original document would be replaced with 2nd page of the replacement document and the 2nd page of the original document would be replaced with the 3rd page of the replacement document and so on. The 4th page of the original document will be remain as-is.

The following screens display the original PDF document before the replacement operation and after the replacement operation.





Note:

1. Only Extract Pages feature is enabled if the PDF document contains at least one signed signature field.

2. If the PDF opened is a secured PDF, depending on the options selected while securing, one or more of the above page manipulation functions are enabled.

3.11 – Command Line Arguments

In addition to opening the pDoc Signer application using Start → Programs → pDoc Signer → pDoc Signer, pDoc Signer can also be invoked from the command prompt or from other applications by running the pDocSigner executable located in the pDoc Signer installation folder. The pDoc Signer application accepts “FilePath” as a command line argument. Any third party application that wants to invoke pDoc Signer can run the pDoc Signer executable using the Windows API and provide the path of the file to be opened as a command line argument. For example, clicking on “Start →Run”, and then running the command “C:\Program Files\pDoc Signer\pDoc Signer.exe” “C:\Sample.pdf” opens the pDoc Signer application and opens the “C:\Sample.pdf” automatically. The above command assumes that pDoc Signer is installed in the “C:\Program Files\pDoc Signer” folder. This feature is particularly useful for custom third party applications to invoke pDoc Signer from their application.

3.12 – Recent File List

The pDoc Signer application maintains a list of 5 recently opened documents and the list can be seen in the “File” menu.

4.0 – Appendix

4.1 – pDoc Signer Silent Installation Instructions

In your administrator PC:

1. Uninstall pDoc Signer if it is already installed.
2. Open the Command prompt.
3. Navigate to the folder where the pDoc Signer installer resides.
4. Type pDocSignerX.X_RXXXX.exe /r and replace the X.X_RXXXX with the actual version numbers of the pDoc Signer software to start the installation in a dialog mode to create a response file that will be used during the silent install.
5. Once the installation is complete, the response file named Setup.iss will be created in the Windows folder; for example, if XP is the OS and the OS drive is C:\, then the Windows directory is C:\Windows.
6. Take a copy the pDocSignerX.X_RXXXX.exe file and the Setup.iss file to use for silent installation.

To perform silent installation on other PCs:

1. Copy the pDocSignerX.X_RXXXX.exe file and the Setup.iss file created above to a local folder on the PC where pDoc Signer is to be installed.
2. Open the Command prompt.
3. Navigate to the folder where the pDocSignerX.X_RXXXX.exe file and the Setup.iss file are located.
4. Type pDocSignerX.X_RXXXX.exe /s /f1"<Setup.iss Path>".Replace the X.X_RXXXX with the actual version numbers of the pDoc Signer software, and replace <Setup.iss Path> with the path name to the folder where the Setup.iss file is located; for example, if pDocSignerX.X_RXXXX.exe and Setup.iss are located in the C:\Temp folder, then the command would be pDocSignerX.X_RXXXX.exe /s /f1"C:\Temp\Setup.iss".
5. The pDoc Signer installation will start in silent mode and complete automatically without any user intervention.

4.2 – Making pDoc Signer the Default Program for Opening PDF Documents

Procedure to Make pDoc Signer the Default Program for Opening PDF Documents in Windows XP*

1. Right click on a PDF document icon. A window will open with a menu.
2. Hover the mouse over the Open With option. A window will open with a list of programs.
3. Left click on the Choose Program... option at the bottom of the list. An Open With Window will open.
4. Left click on the Browse... button. An Open With... window will open.
5. Navigate to the pDoc Signer folder, and double left click on it to display the folder contents.
6. Left click on pDoc Signer.exe. It will be highlighted and the entry pDoc Signer.exe will appear in the File name box.
7. Left click on the Open button. The Open With... window will disappear, and the Open With window will show pDoc Signer highlighted.
8. Left click in the check box Always use the selected program to open this kind of file.
9. Left click on the OK button. The Open With window will disappear, and pDoc Signer will open displaying the document selected in step 1. After this, when you double click on a PDF document icon, pDoc Signer will open and display the document.

Procedure to Make pDoc Signer the Default Program for Opening PDF Documents in Windows 8.1 on Desktop PCs*

1. Right click on a PDF document icon. A window will open with a menu.
2. Hover the mouse over the Open With option. A window will open with a list of programs.
3. Left click on the Choose Default Program... option at the bottom of the list. An Open With Window will open.
    a) Left click "More Options"
    b) Left click "Look for another app for this PC"
    c) Left click C:\ drive or local disk
    d) Double left click Program Files or Program Files (x86)
    e) Double left click pDoc Signer
    f) Left click pDoc Signer.exe
    g) Left click Open
4. The Open With window will disappear, and pDoc Signer will open displaying the document selected in step 1. After this, when you double click on a PDF document icon, pDoc Signer will open and display the document.

*Note: The procedures for other Microsoft operating systems are similar, but may have variations from these steps.

4.3 – Pen Display Installation and Calibration

Installation – To install a pen display, you typically have to download two software packages:

1. The manufacturer's pen display driver
2. The appropriate DisplayLink driver (DisplayLink USB Graphics Software for Windows) from this page: http://www.displaylink.com/downloads/downloads.php

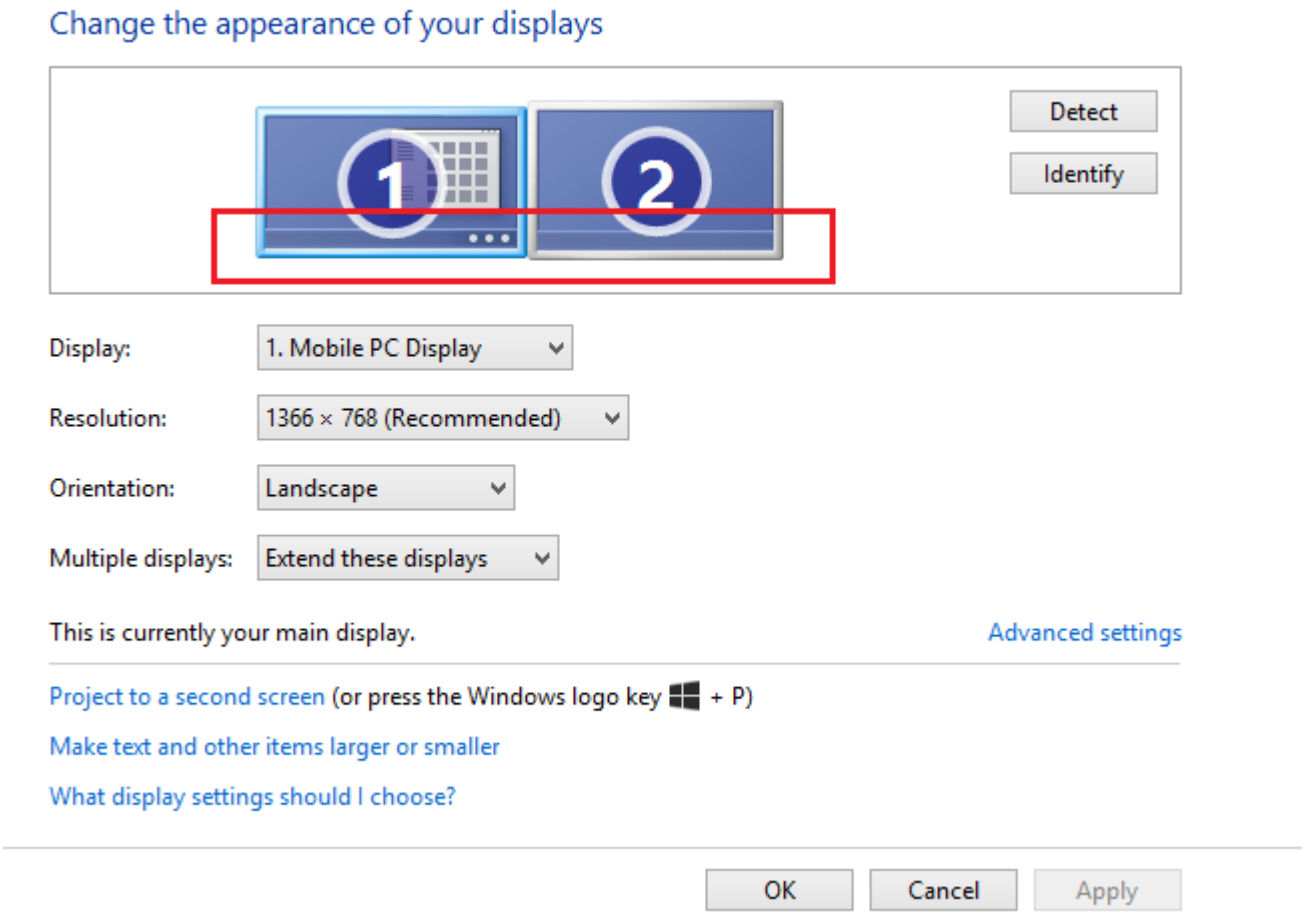
Use the Display program in the control panel to configure the pen display for your installation. You may specify the following characteristics:

1. Resolution, typically the resolution recommended by the manufacturer
2. Orientation, landscape or portrait
3. Multiple displays, typically Extend these displays
4. Alignment, make sure that the bottoms of both the monitors are aligned as shown below

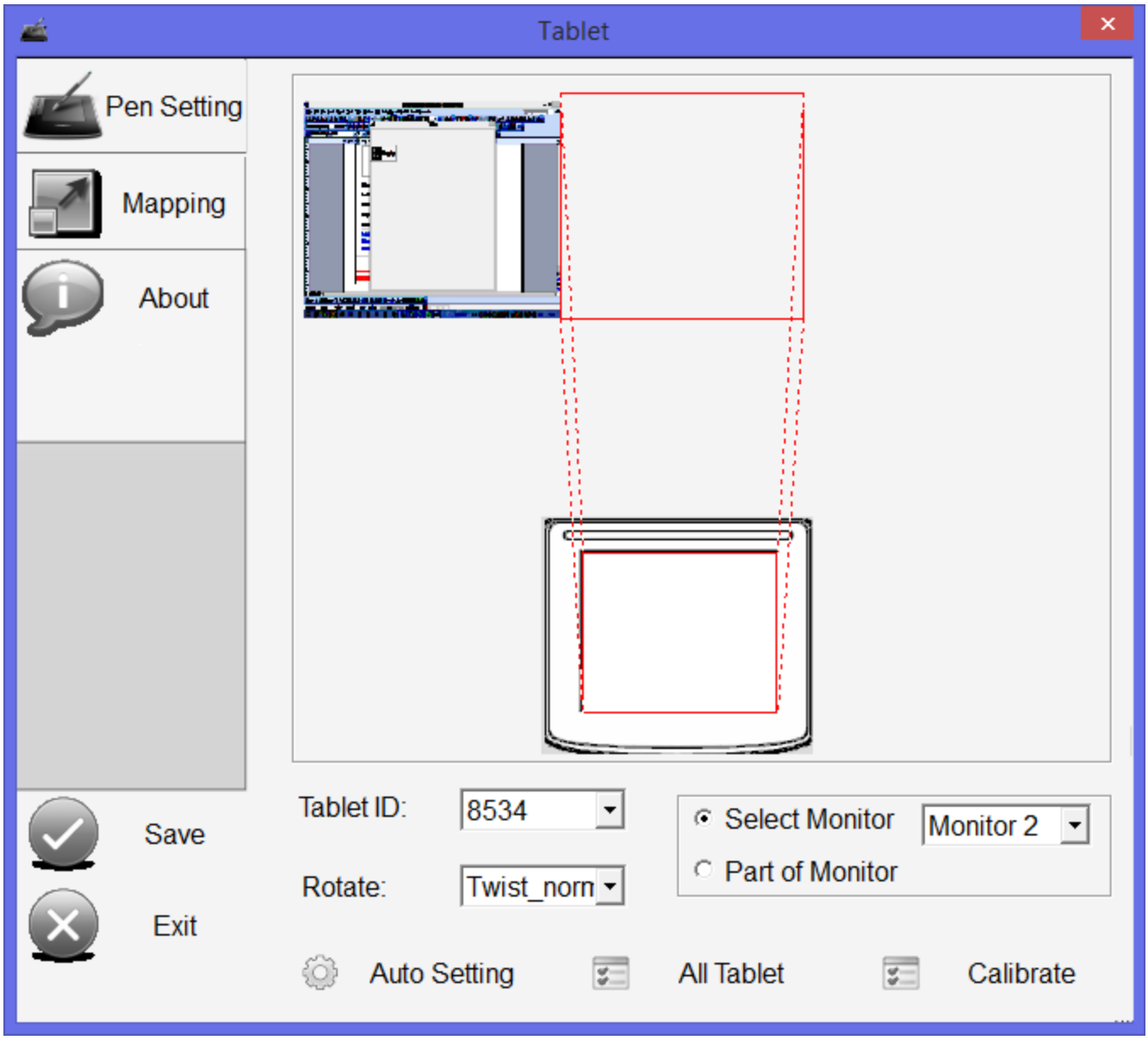
You may use the Tablet program in the Control Panel to complete the installation. For example, you may specify 90 degree rotation for the pen display to operate in portrait mode, see the screenshot below. If you make changes, click on the Save icon on the left side of the window.

Calibration – If you are not able properly scribble using the pen attached to the Pen Display or if the scribbling does not appear at the place where you intend to sign, you might have to calibrate the Pen Display device. To calibrate, follow the steps below.

1. Right click on your desktop on the main monitor and then select "Screen resolution" or navigate to the screen using the Display program in the Control Panel.
2. In the displayed window, make sure that the bottoms of both the monitors are aligned as shown below.



3. Now, navigate to Control Panel and then open the item “Tablet”. In the displayed window, select “Mapping” in the list of options available on the left hand side. See the screenshot below.



4. Click on the option “Calibrate” and then follow the instructions displayed on the “Pen Display” device. Once completed, click on the “Save” button in the above screen and then close the “Tablet” application.

You can use the “Pen Display” device for signature capture.